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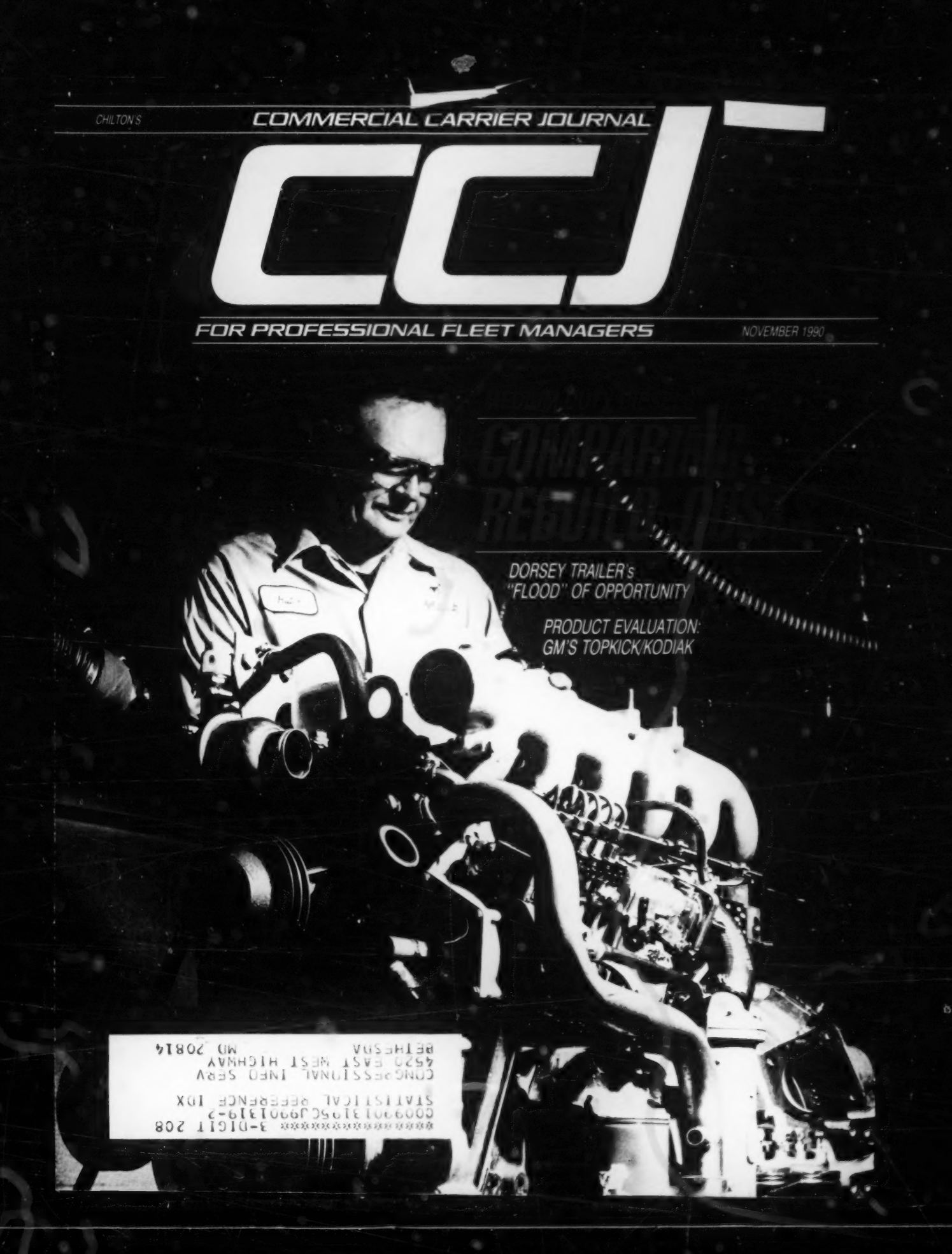
COMMERCIAL CARRIER JOURNAL

CCJ

FOR PROFESSIONAL FLEET MANAGERS

NOVEMBER 1990



DORSEY TRAILER's "FLOOD" OF OPPORTUNITY

PRODUCT EVALUATION: GM'S TOPKICK/KODIAK

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VOLUME 146 NUMBER 11 NOVEMBER 1990

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IN THE NEXT ISSUE

A special report covers one of trucking's most pressing problems: ways fleet managers can reduce driver turnover and build a professional team of committed drivers. Methods to keep, find and retrain quality drivers are discussed by managers of some of the nation's largest fleets.

Government leaders, equipment manufacturers, truck driver training school officials, transportation research specialists, consultants, insurance company executives and leaders of the Professional Truck Drivers Institute of America also contributed.

The result is a revealing look at how management's involvement with drivers can effectively combat truck driver shortages and unprofessionalism behind the wheel. □

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FHWA: 2% of drivers test positive

Hampton, Va.: Slightly more than 2% of the drivers who participated in a recent Federal Highway Administration (FHWA) survey of fleets that have a drug screening program, tested positive, according to Richard Rippert.

Rippert, a former medical driver qualification specialist for FHWA, is now national compliance director and assistant sales director of Pembroke Occupational Health of Richmond, Va. Pembroke is a third party marketer of specimen collection, medical review officer (MRO) and laboratory services.

He presented the results of the FHWA survey of 200 of the 3,500 carriers that came under the federal testing mandate Dec. 21, 1989, at the Virginia Trucking Association's annual Fall Safety Conference held here in October.

Proportions of the drugs discovered, according to the surveyed fleets, were: marijuana, 65%; cocaine, 24%; opiates (e.g., morphine and codiene), 7%; amphetamines ("speed"), 2%; and Phencyclidine (PCP or "angel dust"), 1%.

A breakdown of the drug testing survey results Rippert presented includes: □

	Number Tested	Number Positive	Percent Positive
Pre-employment	22,963	598	2.6%
Periodic	10,788	95	1.0%
Reasonable Cause	155	24	15.5%
Totals	**33,906**	**717***	**2.1%**

*—Includes more than one illicit drug found.

Shippers, teamsters fight undercharge bill

Strong opposition by the Teamsters Union and a coalition of bankrupt shippers may have killed a congressional solution to the problem of undercharges by bankrupt carriers.

The Teamsters Union opposes lower negotiated rates believing it will threaten pension plan contributions and future jobs.

Shippers claim they paid the lower negotiated rates in good faith and that the Interstate Commerce Commission (ICC) supported the practice. Therefore, they shouldn't be forced to pay more.

However, auditors for bankrupt carriers believe the $100 million or so at stake should go to the bankrupt carriers' debtors.

H.R. 3243 was introduced as emergency legislation to uphold the ICC's primary jurisdiction in determining the lawfulness of undercharge claims. The bill provides that, when additional charges are sought by collection agencies, the ICC may find their collection to be an unreasonable practice.

This relief also applies to pending overcharge and undercharge cases. □

Carrier news

J.B. Hunt Transport Services, Lowell, Ark., purchased the assets of Bulldog Trucking of Carnesville, Ga. J.B. Hunt also created a new flatbed division, and raised experienced drivers pay from 27¢ to 33¢ per mile.

Preston Corp., Preston, Md., is closing two subsidiaries, Pioneer Transportation Systems, a general freight carrier in Hurlock, Md., and Reeves Transportation Co., a carpet hauler, in Calhoun, Ga. A new subsidiary, CSI Transportation and Distribution, will operate out of the Reeves' terminals transporting carpet from mills in the southeast to the west.

Ryder Systems, Miami, Fla., sold Ryder Temperature Controlled Carriage, Nashville, Tenn., to an investor group. Two of the investors are Roger Blume, former CEO of Chemical Leaman Tank Lines, Exton, Pa., and Steven George, former owner of Tennessee Cartage which became Ryder Temperature Controlled Carriage in 1984 when it was purchased by Ryder.

Direct Transit, Sioux City, Iowa, acquired the operating authority and customer list of Atlantic Contract Carriers Corp. (ACC), Taylor, Pa. The purchase includes authority to serve Procter & Gamble Co.

Lyons Transportation Lines, Erie, Pa., a less-than-truckload carrier, filed for bankruptcy under provision of Chapter 11 of the U.S. Bankruptcy Code. □

Six more labs certified for drug testing

Six laboratories have been added to the list of labs certified to conduct drug testing by the National Institute of Drug Abuse of the Department of Health and Human Services. (See CCJ, August 1990, page 21, for a complete list of the labs formerly certified by NIDA.) They are:

Alpha Medical Laboratory, 405 Alderson St., Schofield, Wisc. 54476, 800-627-8200; CBC Clinilab, 140 E Ryan Rd., Oak Creek, Wisc. 53154, 800-365-3840 (formerly Chem-Bio Corp.); Clinical Pathology Facility, Inc., 711 Bingham St., Pittsburgh, Pa. 15203, 412-488-6917; Med-Chek Laboratories, Inc., 4900 Perry Highway, Pittsburgh, Pa. 15229, 412-931-7200; Roche Biomedical Laboratories, Inc., 1 Roche Dr., Raritan, N.J. 08869, 800-631-5250; Roche Biomedical Laboratories, Inc., 1120 Stateline Rd., Southaven, Miss. 38671, 601-342-1286.

To be certified, a laboratory must undergo three rounds of performance testing, plus an on-site inspection. □

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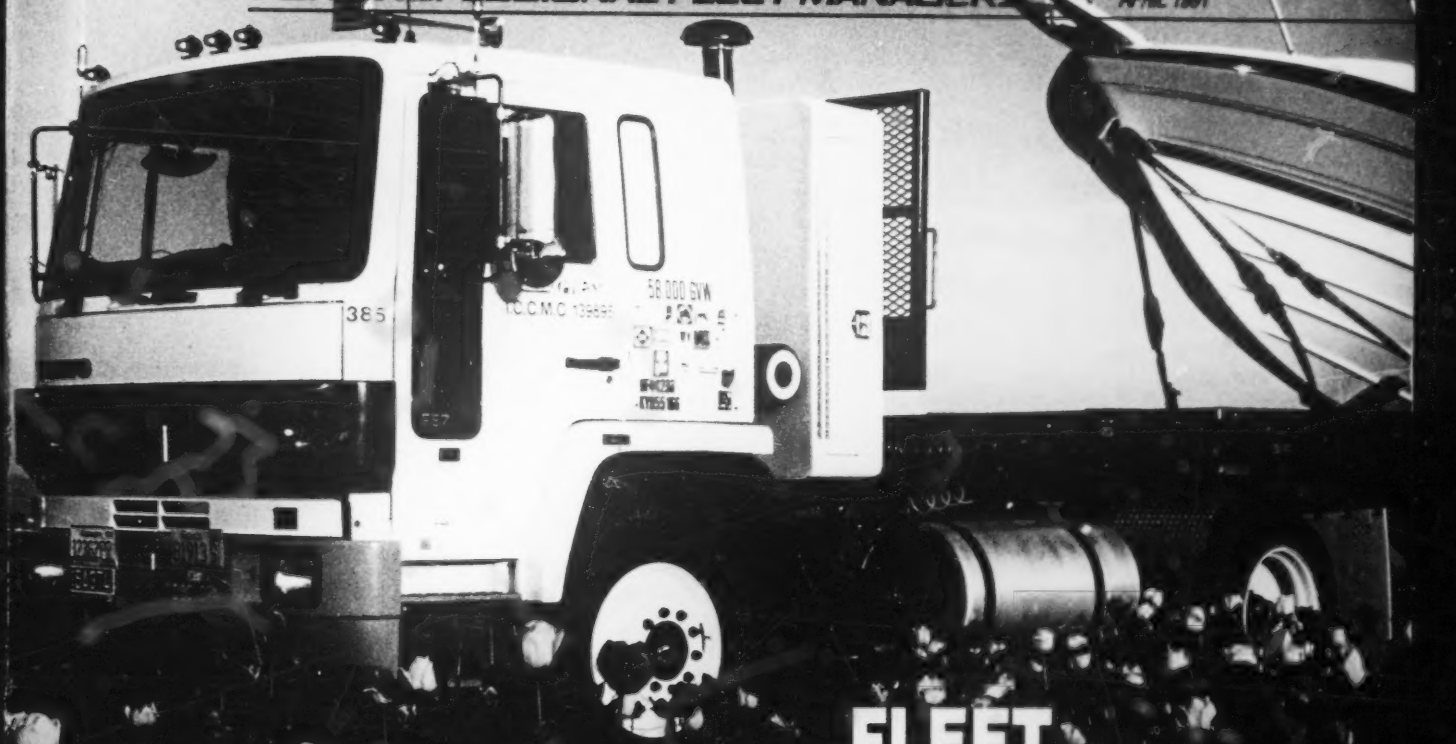

FLEET REFERENCE ANNUAL

INTERSTATE RECIPROCITY, TAXES, ACCESS, PERMITS, LCVs

MAINTENANCE ALERT!
NEW ROADSIDE INSPECTION CRITERIA

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Here are details on the revised DOT/CVSA criteria for placing vehicles out of service at roadside safety inspections, including an expanded section on load securement.

64 TECHNICAL DATA DIRECTORY
This directory provides fleets with free product and service planning aids. Several methods can be used to request the publications listed.

76 EDI MAKES COMMUNICATIONS AS EASY AS ABC
Discover how EDI has made life for Bilkays Express much easier and more profitable. In addition to meeting one of P&G's criteria for selecting core distribution carriers, EDI provides Bilkays with reduced paperwork, fewer follow-up calls and less manual data entry. It also has improved data entry accuracy and customer service. Most important, P&G pays Bilkays' freight bills within five to six working days.

81 FLEET REFERENCE ANNUAL
CCJ's yearly look at reciprocity agreements; where long combination vehicles can go; the primary weight-distance taxes and fuel taxes across the country. Includes the agencies to contact for information on registration, reciprocity, sizes and weights, taxes and permits.

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IN THE NEXT ISSUE

There are many reasons why a fleet executive might be considered for CCJ's Career Leadership award (formerly called the Fleet Maintenance Executive of the Year). Technical ability, business savvy, communication skills, industry involvement—the list goes on. But it's a rare individual who repeatedly has proven that he embodies all of those qualities. Roadway's Don Dawson is that rare individual. Details on why Dawson is CCJ's "Man For All Reasons" will be published in the May issue. □

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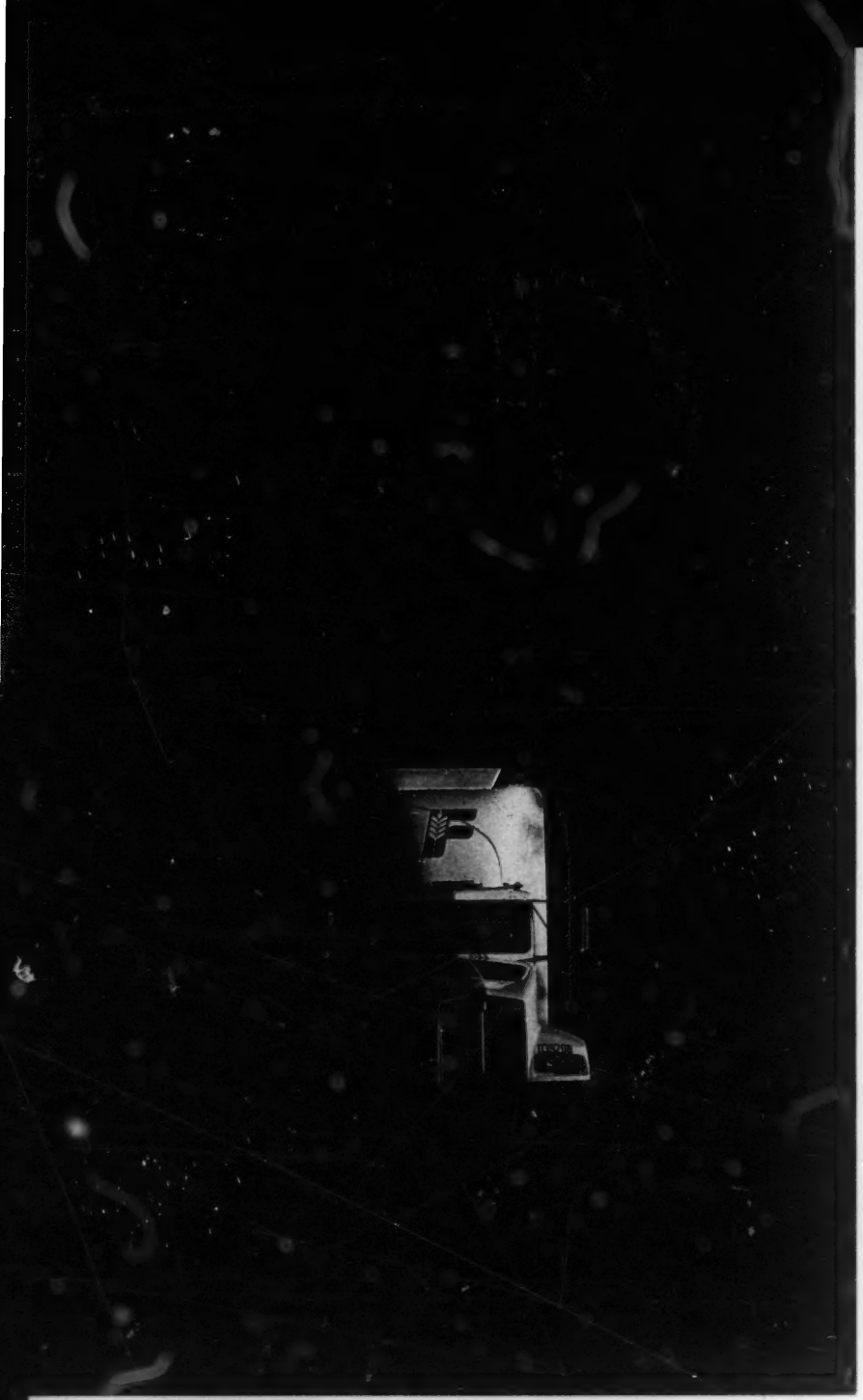


DOT plan shifts costs to states

By **EILEEN CLEAVES,** *Senior Editor*

The nation's governors, facing the toughest fiscal situation since the 1982 recession, are urging Congress not to shift additional transportation costs to the states as outlined in the Bush Administration's proposed transportation bill.

The governors also recommend spending money held in the Highway Trust Fund, as well as the annual receipts—including interest and revenues from the new fuel tax—on transportation.

Recognizing that highway and mass transit projects can provide jobs and boost the sluggish economy, the National Governor's Association (NGA) proposes spending more funds directly on construction or maintenance projects. Money could be raised through increased transportation funding or new sources of funds, asking for more federal transportation assistance, or cutting transportation overhead.

The states don't want a shift of transportation costs from the federal government to the states.

But that is what the five-year program, submitted by the Administration to Congress in February, calls for. The proposal wants state and local governments and the private sector to pay for a greater share of the nation's transportation infrastructure.

The bill will be the starting point for reauthorization of the highway program that expires in September.

The states, hit hard by shrinking revenues and mounting pressures for more spending, are reluctant to assume additional transportation costs.

More than 30 states predict deficits of 3% to 5% if they don't cut spending or increase revenues before the end of the year. The recession has prevented the states from increasing revenues to offset spiraling expenses.

Under the proposal outlined by Transportation Secretary Samuel K. Skinner, existing roads would be reclassified into two highway networks:

• a National Highway System of about 150,000 miles, consisting of the 43,000-mile Interstate highway network and other major routes;
• an urban-rural network of about 700,000 miles of smaller, less-traveled roads.

The federal funding portion would provide 75% to 90% of the cost of the national system. On the urban-rural network, the federal government would reduce its payment share from 75% to 60%. However, federal support for repairing bridges would increase by 50% to $2.8 billion by 1996 on a 75%-25% ratio.

The American Association of State Highway Transportation Officials estimates that, through 1996, the states would be responsible for an additional $52 billion in highway spending under the proposal, while the federal government's increase would be $16 billion.

State and local governments already pay for the lion's share of the nation's transportation infrastructure, says NGA. According to NGA:

• State and local government financed 78% of the $69 billion spent on highway improvements in 1988.

• Between 1980 and 1990, state and local spending on highways increased by nearly 90%, while federal expenditures on highways increased by only 52%.

• Between 1986 and 1990, federal spending on highways dropped 1.5%, while state and local expenditures increased almost 30%.

Many officials question how the states, with all their financial problems, can raise the money needed to match the proposed federal contributions.

"A number of states currently have exhausted their ability to raise fuel taxes. In the past decade, all but three states have raised their highway taxes, many more than once," said Wallace M. Wilkinson, Kentucky governor and chairperson of NGA's Committee on Transportation, to the House Committee on Public Works and Transportation.

The states will seek other ways to boost highway revenues. According to the Highway Users Federation for Safety and Mobility, 25 states will consider issuing bonds for highway projects, 21 states will build toll roads and 18 states will use general funds for highway projects. Fifteen states may increase taxes on diesel fuel or allow local jurisdictions to tax motor fuel. Only four states are contemplating a sales tax on motor fuel; another three will consider repealing the tax exemption for gasohol.

Although states would receive less federal highway money under the Bush plan, more flexibility on spending would be provided. Federal funds could be used for mass transit or for construction of toll roads, including toll roads built with private funding.

Passage of the bill also could stimulate local economies. The Administration estimates that $14.3 billion in federal funds and $4.9 billion in state funds would be spent in 1992, the first year of the program.

"Highway and mass transit projects can provide jobs and boost the sluggish economy," says NGA. "Improvements undertaken now can be made at a lower cost—since construction costs are traditionally lower during an economic downturn."

NGA's recommendation for new funding includes dedicated transportation funds, revenue shifts, bond issues and supplemental appropriations.

The Administration's proposal recognizes the need for an improved infrastructure, but not with additional federal funds.

"More projects will be built on time and on budget because local officials will have to answer to local taxpayers instead of looking to Washington for "free money," said Skinner.

The proposal received positive reviews from the American Trucking Associations (ATA). Thomas J. Donohue, ATA president, praised the portion of the plan that would establish a uniform system of truck registration and tax reporting among states. The bill still requires states to adopt uniform vehicle registration, like the International Registration Plan (IRP) and fuel tax reporting standards, like the International Fuel Tax Agreement (IFTA).

"That's worth $1 billion a year to us in savings," Donohue said.

The bill also would eliminate bingo stamps, increase federal motor carrier safety funding incrementally to $100 million per year and preempt state regulation of rates and routes for truck lines that hold interstate operating authority.

However, the bill made no provisions for longer and heavier trucks. The proposal also omitted any action to control overweight containers.

How to read the charts

The following information is a guide to the items on the succeeding maps and charts.

Data in this section is compiled from volumes of complex laws and regulations. It is impossible to list all of the details. Final authority rests with the texts of laws and regulations involved. Carriers that have questions or seek additional information can find the telephone numbers of the licensing and registration authorities in each state at the end of this section.

One-stop shopping: 15 states have an office where motor carriers can obtain needed credentials and pay taxes required to operate legally.

Commercial Vehicle Safety Alliance (CVSA) is a truck safety group representing 48 states (only Hawaii and South Dakota are not members) and nine Canadian provinces. CVSA provides a framework so participating states and provinces can achieve uniformity, compatibility and reciprocity of standardized heavy vehi-

Continued

cle roadside and on-site safety inspection procedures and out-of-service criteria. CVSA issues a quarterly, color-coded decal for commercial vehicles that pass random inspection.

International Registration Plan (IRP) has 43 member-states, more than any other reciprocity agreement. IRP is a home state vehicle registration system for trucks and buses. A member's truck can travel in all member states and the Canadian province of Alberta with one license plate and one IRP cab card. The motor carrier pays a registration fee to its base (or home) state. The base state sends a portion of that fee to IRP states where the member vehicle or vehicles will travel in the coming year.

Uniform Proration Agreement (UPA) is used by 20 states. Under the UPA plan, the base state issues the license plate which includes space for decals purchased from other states where the vehicle will operate. Registration fees are in proportion to the average annual distance traveled. UPA was created for western states, where it's the dominant agreement. However, the IRP is also in effect in many of the same states.

Multistate Reciprocal Agreement (MRA) covers 20 states. The registration plate issued by the home state is honored by other MRA states if the correct fuel taxes are paid to each state on the basis of miles traveled. Many northeastern states, not members of other compacts, agree to this plan through bilateral agreements. Enforcement is difficult because standardized recordkeeping isn't required.

International Fuel Tax Agreement (IFTA), which covers 16 states, and the **Regional Fuel Tax Agreement (RFTA),** which covers three states, are base state fuel use tax agreements modeled after the IRP.

Under both agreements, the motor carrier files with their base state in order to complete tax registration, reporting and payment for all participating states. The base state issues a license, provides one decal, processes and verifies tax reports, receives license fees and tax payments, and distributes tax payments to appropriate member states.

The consolidated fuel use tax registration, filing, collection, verification and audit functions reduce the complexity and costs of complying with each state's reporting requirements.

Fuel Taxes: The federal motor fuel tax increased 5¢ a gallon on Dec. 1, 1990, raising the federal tax on diesel fuel to 20¢ and on gasoline to 14¢. Half the revenue raised from the 5¢-increase is dedicated to the Highway Trust Fund to finance highway construction. The balance will be used to reduce the federal deficit.

State fuel taxes increased in six states in 1990, down from 18 states in 1989. This year, 27 states are expected to consider increasing highway revenues.

Third Structure Taxes are ton-mile or axle-mile taxes that place a financial and paperwork burden on the trucking industry. The ATA has recommended that a two-tiered tax collection program—consisting of registration fees and fuel taxes—be established to replace third-structure taxes.

Long Combination Vehicles (LCVs): Explanations of the three basic LCV configurations—Rocky Mountain Doubles (RMD), Turnpike Doubles (TD) and Triple Trailers (T)—and where the vehicles can travel are explained in one of the following maps. The vehicles may require permits or be restricted to designated highways.

53-ft Trailers are allowed by 41 states on Interstates and designated highways, and by 32 states on state and nondesignated highways. Most states have an axle-spacing or a kingpin requirement to minimize "swing out" on the rear end of the trailer.

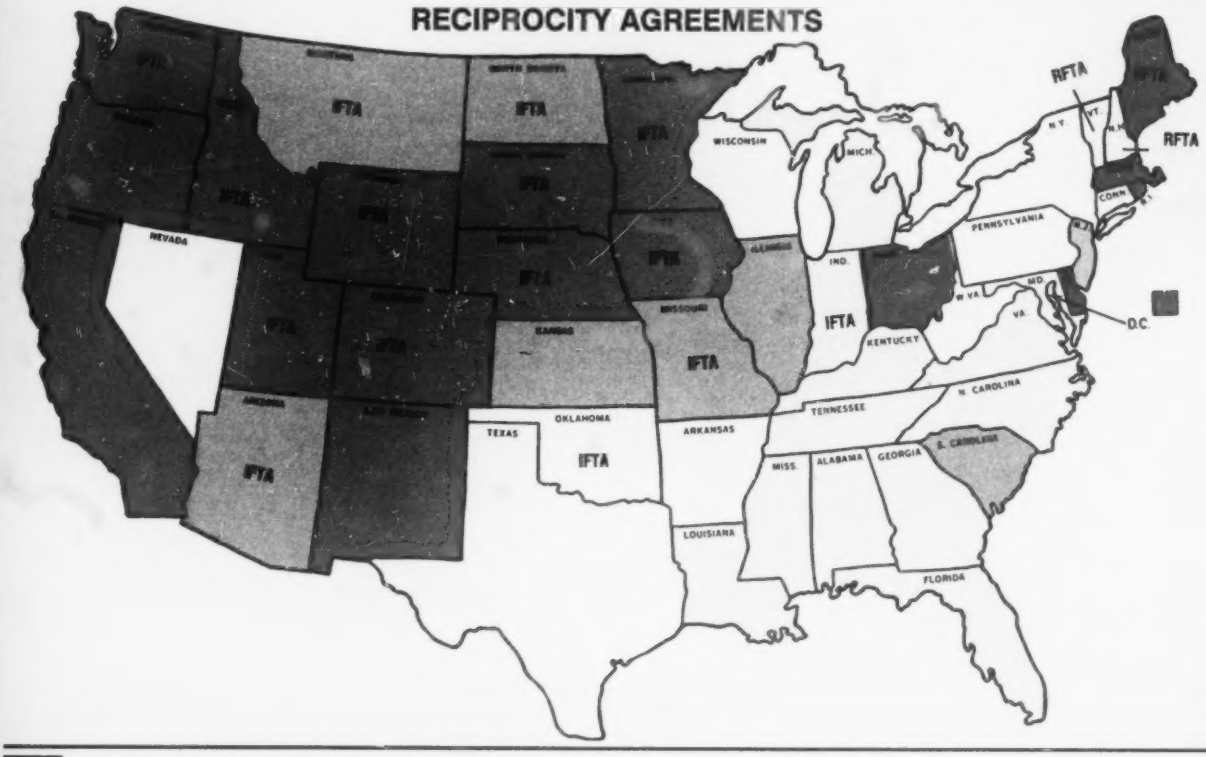
Access: The Federal Highway Administration (FHWA) issued a final rule June 1, 1990. It amends reasonable access for commercial motor vehicles with lengths and widths authorized by the Surface Transportation Assistance Act of 1982 (STAA). The access rule:

- defines "terminal" as a location where freight originates, terminates or is handled in the transportation process or where carriers have operating facilities;
- prohibits states from restricting access within 1 mile from the National Network, except for specific safety reasons on individual routes;
- states that allow specific vehicles access on an individual route must provide access on that route to all vehicles of the same type. Distinctions between vehicle types must only be based on significant differences in their operating characteristics;
- blanket restrictions on 102-in.-wide vehicles are not allowed;
- vehicle dimension limits shall not be more restrictive than Federal requirements;
- all states must have an access review process, except those with laws authorizing the operation of STAA-dimensioned vehicles on all public roads and highways;
- states without FHWA-approved access provisions in effect by June 1, 1991, must follow the requirements stated in the final rule.

A list of final access provisions approved by FHWA will be issued in June.

Intrastate drug testing: Twenty-seven states have adopted the U.S. Department of Transportation's drug testing rules for motor carriers (49 C.F.R. 391), according to ATA's Law Department. □

RECIPROCITY AGREEMENTS



	States In Multistate Reciprocal Agreement
	States In Multistate Reciprocal Agreement & International Registration Plan
	States In Multistate Reciprocal Agreement, International Registration Plan & Uniform Proration Agreement
	States In International Registration Plan
	States In International Registration Plan & Uniform Proration Agreement
	States In Uniform Proration Agreement
RFTA	Regional Fuel Tax Agreement
IFTA	International Fuel Tax Agreement
CVSA	All states are members of the Commercial Vehicle Safety Alliance except: Hawaii and South Dakota.

WHAT YOU SEE...

are the states which are members of the major reciprocity agreements. The map is designed to give you a starting point from which to check out the requirements of each state through which your vehicles will pass.

WHAT YOU DON'T SEE...

is the minute detail of interstate reciprocity agreements, many of them involving several pages of text. Nor does the chart cover Public Utility Commission (PUC) agreements involving "for-hire" carriers.

Hence, you are urged to seek further details either from your associations or by contacting appropriate state authorities. Addresses and telephone numbers are listed. If you have any doubts, this should be done in advance of the trip.

While every precaution has been taken to assure accuracy, correctness is not guaranteed, and the publishers waive all responsibility for errors or omissions.

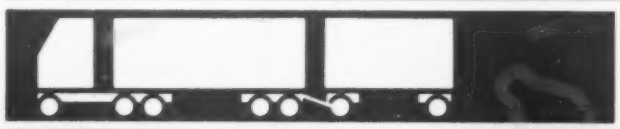
State	One-stop Shopping	Agreements						Taxes				Third Structure Tax Primary Weight Ton or Axle Mile
		CVSA	IRP	UPA	MRA	IFTA	RFTA	¢/gal Gas	¢/gal Diesel	¢/gal Gasohol	¢/gal LPG	
ALA		x	x		x			13	14	13	0	
AK		x		x				8	8	0	0	
ARIZ	x	x	x	x	x	x		18	18	18	18	x
ARK		x	x					13.5	12.5	13.5	11.5	
CALIF		x	x	x				14	14	14	6	
COLO	x	x	x	x		x		22	18	22	20.5	
CONN		x	x					22	22	19	20	
DEL		x						19	19	19	16	
D.C.		x						18	18	18	18	
FLA	x	x	x		x			10.9	10.9	10.9	10.9	
GA		x	x		x			12	12	12	12	
HI								11	11	11	7	
IDA		x	x	x		x		18	18	13	18	x
ILL		x	x	x	x			19	22.5	19	16	
IND	x	x	x		x	x		15	16	15	16	
IA	x	x	x	x		x		20	22.5	19	20	
KANS	x	x	x	x	x			16	18	15	14	
KY	x	x	x		x			15	12	15	15	x
LA		x	x		x			20	20	20	16	
ME	x	x					x	17	20	17	17	
MD		x	x		x			18.5	18.5	18.5	18.5	
MASS		x						21	21	21	4.2	
MICH		x	x		x			15	15	15	15	
MINN	x	x	x	x		x		20	20	20	20	
MISS		x	x		x			18	18	18	18	
MO		x	x	x	x	x		11	11	11	11	
MONT		x	x	x	x	x		20	20	20	0	
NEB		x	x	x		x		26.4	26.4	23.4	22	
NEV		x	x					23	22	23	20	
N.H.		x	x				x	16	16	16	14	
N.J.	x	x			x			10.5	13.5	5.5	5.25	
N.M.		x	x	x				16.2	16.2	13.2	16.2	x
N.Y.		x	x					8	10	8	8	x
N.C.	x	x	x		x			21.9	21.9	21.9	21.9	
N.DAK		x	x	x	x	x		17	17	17	17	
OHIO		x	x					20	20	20	18	
OKLA	x	x	x			x		16	13	16	17	
ORE		x	x	x				20	20	20	20	x
PA		x	x					12	12	12	12	
R.I.		x						20	20	20	20	
S.C.		x	x	x	x			16	16	16	16	
S.DAK			x	x		x		18	18	16	16	
TENN		x	x		x			21	17	21	14	
TEX		x	x					15	15	15	15	
UTAH		x	x	x		x		19	19	19	19	
VT	x	x	x				x	16	17	16	0	
VA	x	x	x					17.5	16	17.5	16	
WASH		x	x	x		x		22	22	22	0	
W.VA.		x	x					20.35	20.35	20.35	20.3	
WISC	x	x	x			x		21.5	21.5	21.5	21.5	
WYO		x	x	x		x		9	9	9	9	

Long Combination Vehicles Allowed	53-ft Trailers Allowed P – Permit Needed I&DH – Interstate & Designated Hwys S&NH – State & Non-designated Hwys		Access Policy							Federal Drug Testing Rules Adopted Intrastate	State
	I&DH	S&NH	In Effect	.5 mile	1 mile	3 mile	5 mile	10 mile	Unlimited		
	X	X	X		X					X	ALA
RMD; TD			X				X				AK
RMD	X	X	X						X		ARIZ
RMD; TD	X	X	X						X	X	ARK
	X	X	X		X				X		CALIF
RMD; TD; T	XP	XP	X						X	X	COLO
			X		X					X	CONN
TD	X	X	X						X	X	DEL
			X								D.C.
TD	X	X	X				X			X	FLA
	X	X	X		X					X	GA
			X							X	HI
RMD; TD; T	XP		X						X		ID
	X	X	X				X			X	ILL
T	X	X	X						X	X	IND
	X	X	X							X	IA
TD; T	X	X	X						X		KAN
	X	X	X				X				KY
RMD; TD	X		X					X		X	LA
			X	X							ME
			X						X		MD
TD			X								MASS
	X		X				X				MICH
	X	X	X								MINN
TD	X	X	X						X	X	MISS
	X		X					X		X	MO
RMD; T	X	X	X						X		MONT
T	X	X	X						X	X	NEB
RMD; TD; T	X	X	X						X		NEV
			X						X	X	N.H.
			X								N.J.
RMD; TD	X	X	X							X	N.M.
TD	X		X								N.Y.
	X		X			X				X	N.C.
RMD; TD; T	X	X	X					X		X	N.DAK
	X	X	X						X	X	OH
RMD; TD; T	X	X	X				X				OKLA
T	X	XP	X	X							ORE
	X	X	X		X						PA
TD			X		X					X	R.I.
	X		X							X	S.C.
RMD; TD; T	X	X	X						X		S.D.
	X	X	X						X	X	TENN
	X	X	X						X	X	TEX
RMD; TD; T	XP	XP	X						X	X	UTAH
			X								VT
	X	X	X	X							VA
RMD	XP	XP	X						X		WASH
	X		X								W.VIR
	X	X	X						X	X	WISC
RMD	X	X	X						X	X	WYO

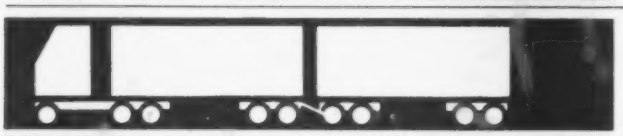
WHERE LONG COMBINATION VEHICLES CAN GO

Note: Triples, Rocky Mountain Doubles and Turnpike Doubles may require permits or be restricted to designated highways and, in some cases, operate only for short distances along specific routes. Contact individual state authorities for additional information.

BASIC LONG COMBINATION VEHICLE CONFIGURATIONS



RMD: Rocky Mountain Double
Tractor pulls standard length semi-trailer plus shorter trailer. Weight distributed over 7 or 8 axles.



TD: Turnpike Double
Tractor pulls two standard length tandem axle semi-trailers. Weight distributed over 9 axles.

T: Triple Trailer
Tractor pulls three short semi-trailers, the two rear with converter dollies. Weight distributed over 7 axles.

PRIMARY WEIGHT-DISTANCE TAXES and FUEL TAXES IN CENTS-PER-GALLON

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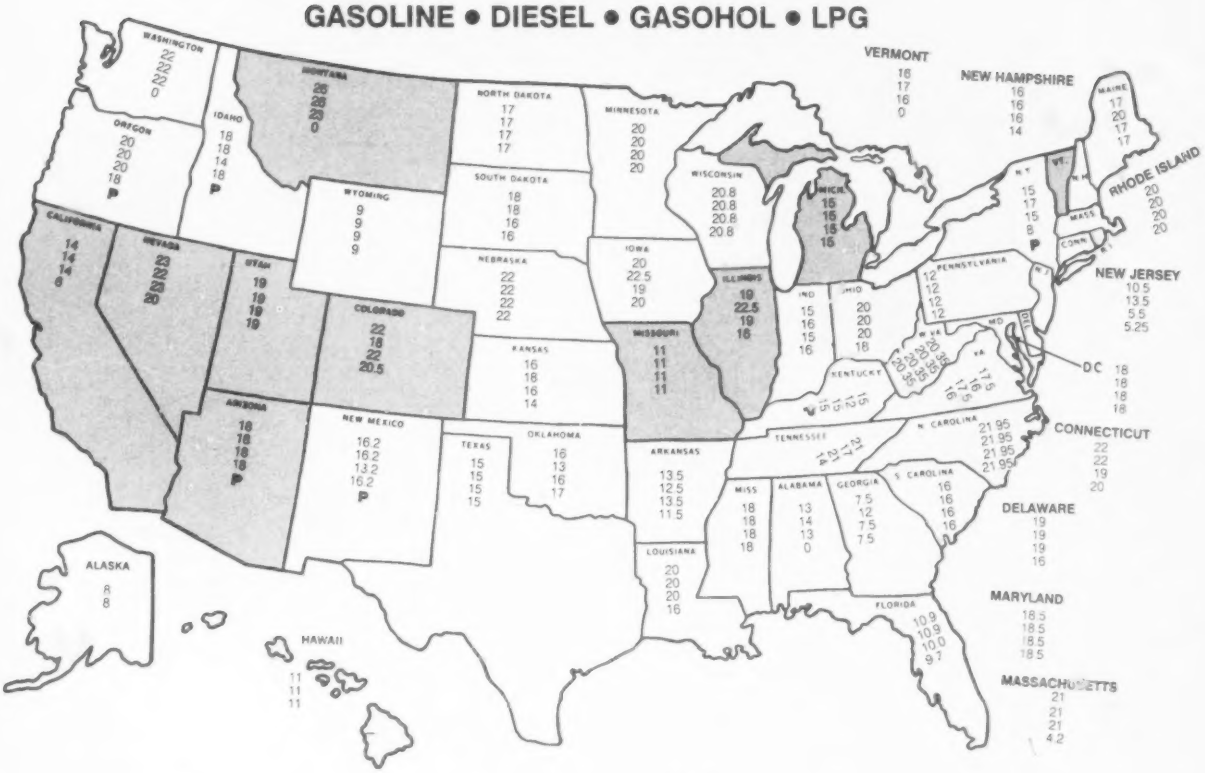

P—States With Primary Weight-Distance Tax (usually ton-mile or axle-mile tax).

Fuel tax reports required

No fuel tax reporting laws

Fuel tax reporting only on special fuel (not gasoline)

Since taxes are subject to revision, contact the appropriate state office for current information.

According to The American Trucking Association, third structure tax rates charged by states include:

•**Arizona:** Motor Carrier Tax begins at 1.319¢ per mile for 26,000 lb commercial vehicles and increases in two-ton increments to 8.0¢ per mile for an 80,000-lb unit.

•**Idaho:** Use Fee for vehicles and combinations over 60,000 lb GVW begins at 3.005¢ per mile and increases in two-ton increments to 4.49¢ per mile for an 80,000-lb unit. Vehicles over 80,00 lb pay 4.49¢ per mile plus 0.21¢ a mile per ton or fraction thereof over 80,000 lb.

•**Kentucky:** Weight-distance tax for vehicles and combinations with a maximum registered GVW over 59,999 lb is charged 4¢ per mile.

•**New Mexico:** Weight-distance tax for vehicles and combinations over 26,0001 lb GVW begins at 0.797¢ per mile and increases in two-ton increments to 3.168¢ per mile for vehicles 78,00l lb and over. With prior approval by the state, vehicles customarily used for one-way hauls, which run at least 45% of their miles empty, pay at two-thirds of the rates.

•**New York:** Highway Use Tax applies to: power units and combinations with a GVW over 18,000 lb; trucks with an unladen weight over 8,000 lb; and tractors with an unladen weight over 4,000 lb. Asupplemental tax, in the amount equivalent to the applicable Highway Use Tax, is also imposed on all public highways exclusive of the toll portions of the New York State Thruway.

•**Oregon:** Weight-Mile tax applies to commercial vehicles over 26,000 lb GVW. Vehicles are taxed according to either the maximum combined weight declared for purposes of the tax, or the number of taxable miles traveled. The tax is 4.4¢ per mile for vehicles over 26,001 lb increasing in two-ton increments to 13.2¢ per mile for 80,000 lb vehicles.

CONTACT THESE STATE AGENCIES FOR INFORMATION ON REGISTRATION, RECIPROCITY, SIZES/WEIGHTS, TAXES, PERMITS:

ALABAMA
Registration
205-244-6700
Motor Fuel Division
205-261-2904
Oversize/Overweight
205-261-6288

ALASKA
Registration
907-269-5571
Motor Fuel Division
907-465-2322
Oversize/Overweight
907-345-7636

ARIZONA
One Stop Shopping
602-255-6775

ARKANSAS
Registration, Taxes
501-682-4800
Oversize/Overweight
501-569-2381

CALIFORNIA
Registration
916-732-7075
Motor Fuel Division
916-322-2010
Taxes
916-369-0500
Oversize/Overweight
916-324-7230445-9233

COLORADO
One Stop Shopping
303-534-1805
Taxes
303-866-3324

CONNECTICUT
Registration
203-566-2394
8 Motor Fuel Division
203-297-5780
Oversize/Overweight
203-566-4010

DELAWARE
Registration
302-736-4459
Motor Fuel Division
302-736-4538
Oversize/Overweight
302-736-4374

DISTRICT OF COLUMBIA
Registration
202-727-6694
Audit Division
202-727-6566

Oversize/Overweight
Dept. of Transportation
202-727-7049

FLORIDA
One Stop Shopping
904-488-6921
Oversize/Overweight
904-488-4961
Safety Enforcement
904-488-6289
Weight Enforcement
904-488-7920

GEORGIA
Registration
404-656-4145
Motor Fuel Division
404-656-4050
Oversize/Overweight
404-656-5428
Taxes
404-656-4165

HAWAII
Registration
808-941-2255
Motor Fuel Division
808-548-3892
Oversize/Overweight
808-548-5821

IDAHO
Registration
208-334-8611
Motor Fuel Division
208-334-7706
Oversize/Overweight
208-334-8420

ILLINOIS
Registration
217-785-1804
Motor Fuel Division
217-785-1397
Oversize/Overweight
217-782-6271

INDIANA
One Stop Shopping
317-232-2791
Motor Fuel Division
317-232-1850
Taxes
317-232-2189

IOWA
One Stop Shopping
515-237-3264

KANSAS
One Stop Shopping
913-273-8192

KENTUCKY
One Stop Shopping
502-564-4540

LOUISIANA
Registration
504-925-6270
Motor Fuel Division
504-925-7656
Oversize/Overweight
504-343-2345

MAINE
Registration, Licensing
207-626-8600
Motor Fuel Division
207-289-3851
Oversize/Overweight
207-626-8630

MARYLAND
Registration
301-787-2971
Fuel Taxes
Motor Vehicle Fuel Tax
301-974-3134
Oversize/Overweight
301-333-1597

MASSACHUSETTS
Registration
617-727-3559
Motor Fuel Division
617-727-4373
Oversize/Overweight
617-973-7796

MICHIGAN
One Stop Shopping
517-322-1166

MINNESOTA
One Stop Shopping
612-296-2138
Fuel-Trip Permit Only
612-296-7935
Hauling Authority
612-296-6441
Oversize/Overweight
Permits
612-296-6441
Prorate, Reciprocity
612-296-7935

MISSISSIPPI
Registration
601-359-1248
Motor Fuel Division
601-359-1261
Oversize/Overweight
601-359-1148

MISSOURI
Registration, Permits, Fuel
314-751-3466
Oversize/Overweight
800-877-8499

MONTANA
Registration, Permits & Oversize/Overweight
406-444-6130
Motor Fuel Division
406-444-3474

NEBRASKA
Registration
402-471-2281
Motor Fuel Division
402-471-2971
Oversize/Overweight
402-479-4775

NEVADA
Registration, Motor Fuel
702-687-5340
Oversize/Overweight
702-687-5410

NEW HAMPSHIRE
Registration & Fuel Tax
603-271-2311
Oversize/Overweight
603-271-2691

NEW JERSEY
One Stop Shopping
609-588-3600

NEW MEXICO
Registration
505-827-0392
Motor Fuel Division
505-827-4519
Oversize/Overweight
505-827-0367

NEW YORK
Registration
518-474-0871
Motor Fuel Division
518-457-3652
Oversize/Overweight
518-457-1155

NORTH CAROLINA
One Stop Shopping
919-733-0671
Oversize/Overweight
919-733-7154

NORTH DAKOTA
Registration
701-224-2725
Corp. Income Tax
701-224-2045
Motor Fuel Tax Section
Non-IFTA: 701-224-3239
IFTA: 701-224-2725
Oversize/Overweight
701-224-2621

OHIO
Registration
614-752-7500
Motor Fuel Division
614-466-3921
Oversize/Overweight
614-275-2800

OKLAHOMA
One Stop Shopping
405-521-3036
Oversize/Overweight
405-425-2390

OREGON
Registration
503-378-6903
Weight Mile Division
503-378-6699
Oversize/Overweight
503-378-2568

PENNSYLVANIA
Registration
717-783-6095
Motor Fuel Taxes
717-783-2518
Corporate Franchise Tax
717-783-6035
Oversize/Overweight
717-787-4680

RHODE ISLAND
Registration & Oversize/Overweight
401-277-2986
Motor Fuel Division
401-277-2950
Corporate Franchise Tax
401-277-3061

SOUTH CAROLINA
Registration
803-251-2960
Motor Fuel Division
803-737-4872
Oversize/Overweight
803-737-1279

SOUTH DAKOTA
Multi-State Licensing
605-773-3501
Motor Fuel Division
605-773-5335
Oversize/Overweight
605-698-3925

TENNESSEE
Registration
615-741-1786
Motor Fuel Division
615-741-3394
Oversize/Overweight
615-741-3821

TEXAS
Registration
512-465-7686
Oversize/Overweight
512-465-1700

UTAH
Registration & Fuel Permits
801-538-8390
Oversize/Overweight
801-965-4508

VERMONT
One Stop Shopping
802-828-2070

VIRGINIA
One Stop Shopping
804-786-2488
Hauling Permits
804-786-2787

WASHINGTON
Registration & Fuel
206-753-6993
Oversize/Overweight
206-459-6715

WEST VIRGINIA
Registration
304-348-3900
Motor Fuel Division
304-348-3333
Oversize/Overweight
304-348-3643

WISCONSIN
One Stop Shopping
608-266-9900

WYOMING
Registration & Fuel
Oversize/Overweight
307-777-5231

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COMMERCIAL CARRIER JOURNAL

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FOR PROFESSIONAL FLEET MANAGERS

JUNE 1998

Spec'ing Decals:
Reflections on Safety

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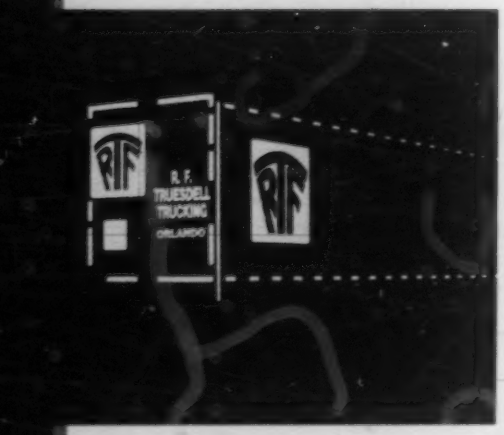
VOLUME 147 NUMBER 6 JUNE 1991

FEATURES



40 Spec'ing Decals: REFLECTIONS ON SAFETY
On dark highways, motorists often crash into the side or rear of stopped or slow-moving trucks that aren't seen in time to be avoided, says the National Safety Council's Motor Fleet Safety Manual. Proven to reduce such nighttime accidents, reflective tape may soon be required on new trailers.

45 SETBACK AXLES: PROS & CONS
Steer axles affect tire wear, ride, handling and weight capacity. Here's a thought-provoking collection of comments on set-back mounting.

48 FLEET GRAPHICS AWARDS
Good-looking trucks enhance the public's perception of the industry and establish a standard for all commercial vehicle operators to follow. The Commercial Fleet Graphics Awards were created to recognize individual and corporate commitments to excellence in the design and use of commercial vehicle markings.

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THE MOST WORRISOME JOB IN TRUCKING – The private fleet manager's job is the most worrisome in trucking. What makes it that way is the healthy prospect of becoming an ex-private fleet manager.

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TOUGH TACTICS MAY SAVE A TRUCKER – After longtime company managers purchased a profitable flatbed operation in a 1983 leveraged buyout, the company started having financial problems.

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EMERGENCY REVISIONS AND OTHER CVSA NEWS – Concerned that thousands of trucks might be placed out of service at roadside safety inspections for properly repaired tires, CVSA has revised some of the 1991 out-of-service criteria published in February.

59 MAINTENANCE & TECHNOLOGY
THE MOUSE THAT ROARED – Have you allowed your healthy skepticism of "mileage-enhancing" fuel additives to ripen into blanket cynicism?

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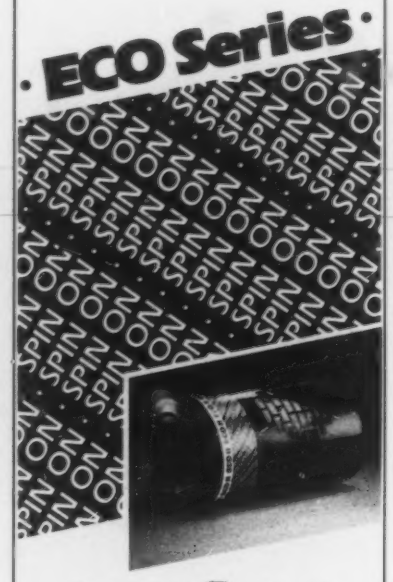
Is your air filter worth $6500?



That's what it can cost if a careless filter change dusts your engine.

With cartridge filters, you need to follow very detailed procedures. Overlooking just one can be an expensive mistake.

But with the new ECO *Spin On* filter from Farr you avoid the risk. It's completely disposable. No gaskets to lose. No housings to clean. Filter change is fast, easy and safe.

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IN THE NEXT ISSUE

To find out more about the financial health of your freight hauling competitors, check out next month's exclusive Top 100 issue. That's when CCJ will announce its 24th annual revenue ranking of America's largest for-hire trucking companies—from $20 million to more than $7 billion in annual revenues. In a companion section, CCJ ranks the Second 100, arguably the most dynamic, innovative group in the business. These are the up-and-comers, knocking on the door to big-time trucking. □

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BUSINESS MAGAZINES/ MARKETING SERVICE/ BOOKS

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Shippers, transporters analyze intermodal services

Higher fuel prices and freight rates, and shortages of qualified drivers will have a stronger positive impact on the growth of intermodal transportation – movement of trailers or containers by rail, combined with local or regional delivery by truck – than new intermodal services or equipment.

That's one of the findings cited in the recently published *1990 Intermodal Index*, a market research report sponsored by the Intermodal Transportation Association and the National Industrial Transportation League. The survey was conducted by Temple, Barker & Sloane, of Lexington, Mass., and its subsidiary, Decision Research Corp.

The data-filled index is based on 30-minute telephone interviews in late 1990 with 459 randomly selected transportation managers and 125 plant/distribution center managers responsible for a minimum of 100 full truckloads or containerloads of finished goods annually. At least 10% of their traffic moves 500 miles or more.

The study also determined:

• 64% of the shippers use intermodal services to handle 15% of their full, long-distance TL shipments.

• Plant/distribution center managers believe they have a "significant influence" on mode and carrier selection. They also rate truck and intermodal services lower than corporate transportation managers do.

• Service issues – particularly improved service reliability – are major barriers to increased intermodal use. Equipment enhancements have the least potential to increase intermodal use.

• 38% of the shippers believe widespread availability of twin 48-ft trailers will benefit their company. However, 44% of the intermodal users and the large shippers (53% of those surveyed) are "more likely" to expect benefits from twin 48s.

Contact the Intermodal Transportation Association, 301-864-4163, or the National Industrial Transportation League, 703-524-5017, for a copy of the 32-page index. □

Ratings of Shipper Selection Criteria When Buying Trucking and Intermodal Service

Selection Criteria	% of shippers rating it 5 or 6 on a 6-pt scale of importance
Service reliability	93%
Quality of P&D	92%
Equipment availability	88%
Transit time	87%
Quality of customer service	85%
Overall ease of doing business	83%
Low likelihood of damage	82%
Price	81%
Equipment quality	80%
Payment of damage claims	75%
Shipment in transit status	73%
Equipment dimension/size	60%
Quality of salespeople	55%
EDI capabilites	42%

No 'magic bullet' solution to driver shortage

You won't find a clear-cut reason for high driver turnover in a survey recently done by Gene C. Griffin and Julene M. Rodriguez. Griffin is director and Rodriguez is a transportation economist for the Upper Great Plains Transportation Institute at North Dakota State University, Fargo, N.D.

"No single factor causes turnover," claim Griffin and Rodriguez. That conclusion is based on analysis of 20-page questionnaires completed by nearly 4,000 company drivers employed by 13 truckload fleets.

Thus, say the researchers, driver-hiring and retention efforts "must be comprehensive and long-range. There is no magic bullet."

The research showed that most drivers want more training and have a "strong desire" to have an influence in many company functions. They want to be "equal with other employees."

The study also determined:

• Drivers crave contact with management because drivers on the road for a long time "may get a feeling of being isolated from the firm."

• Since many drivers don't "have a true picture of the job when they start," new drivers should get a "great deal of attention" in the first 6 to 12 months "to assist them in adjusting their expectations to reality."

• 81% said career advancement was important. In addition to more money, they claimed advancement includes a regular schedule, being home more often and a classification system based on performance. However, 56% thought opportunities for advancement was poor.

The researchers concluded that: "There is not a shortage of drivers; there is a lack of human resource strategy to take advantage of the available pool." □

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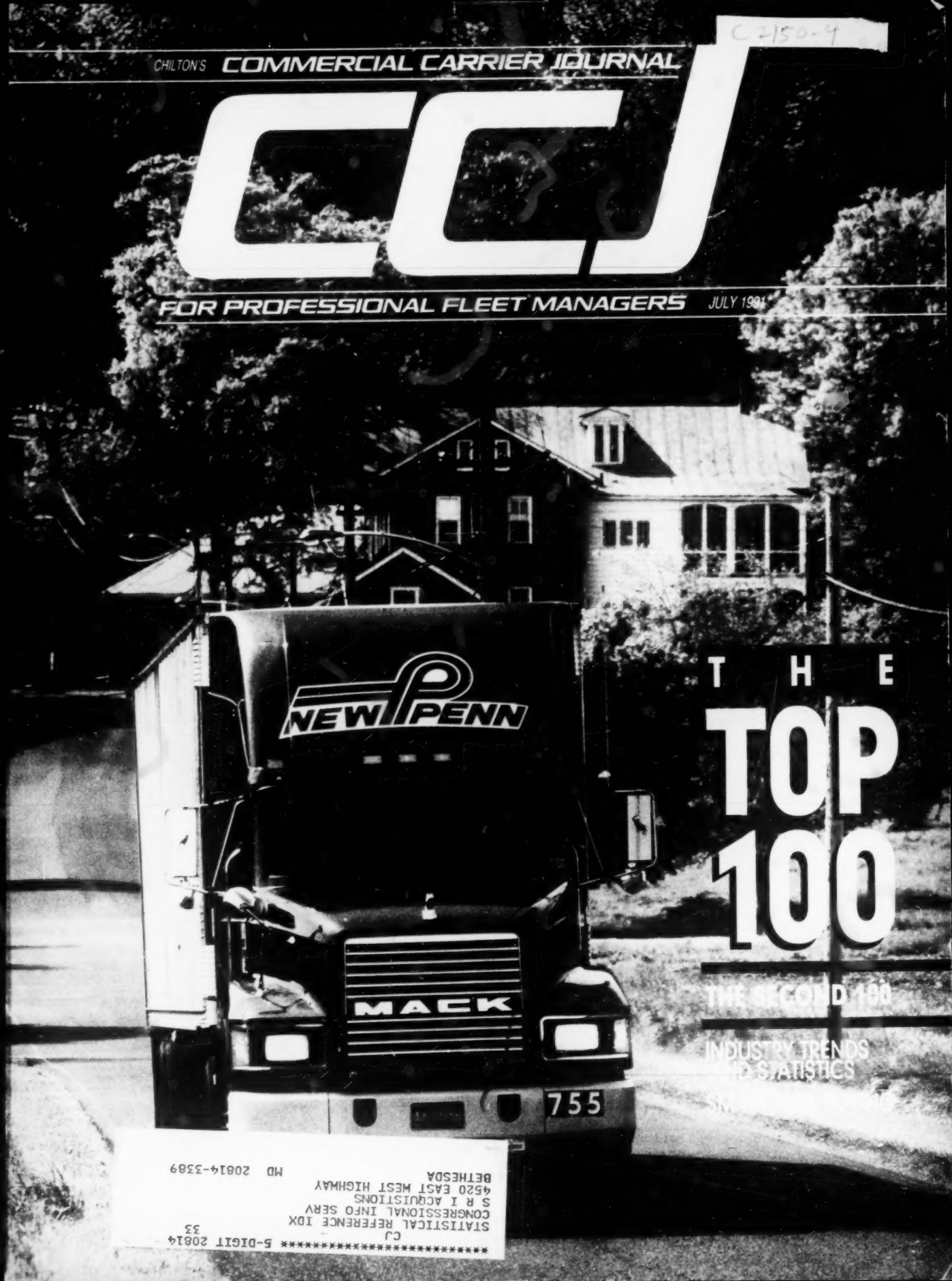
CHILTON'S COMMERCIAL CARRIER JOURNAL

CCJ

FOR PROFESSIONAL FLEET MANAGERS JULY 1991



THE TOP 100

THE SECOND 100

INDUSTRY TRENDS AND STATISTICS

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FEATURES

57 THE TOP 100
A recession led by surging fuel prices usually causes competitors to stumble in trucking's annual race for revenues and profits. But most TOP 100 carriers cleared the hurdles, outraced the GNP and posted increased revenues and profits in 1990. Read all about it in CCJ's annual financial rankings of the largest for-hire motor carriers.

75 INDUSTRY TRENDS & STATISTICS
The last time truck, trailer and equipment manufacturers suffered as much as now was during the 1982 recession. But economists and trucking experts are predicting a glorious comeback. They say fundamental factors affecting the demand for trucks, trailers and equipment are positive for the next several years. But for now, here's how the manufacturers fared in 1990.

COLUMNS

Safety: Page 41

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NHTSA SHOULD MANDATE AUTO SLACKS – NHTSA has issued a Notice of Proposed Rulemaking specifying that automatic slack adjusters will be required on all air-braked vehicles by 1994.

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ROADCHECK RESULTS SLIGHTLY BETTER – Some 2,500 state, provincial and local motor carrier safety enforcement officers, representing 120 agencies, conducted Roadcheck '91, May 14-16.

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FEWER RESTRICTIONS ON ABOVEGROUND TANKS – Aboveground fuel tanks continue to be exempt from Environmental Protection Agency insurance requirements. And EPA's plans to selectively regulate aboveground facilities have recently been shot down by the OMB.

47 BUSINESS SIDE
HEDGING: FUTURE FUEL PURCHASING METHOD? – Until recently, getting involved with commodity futures for any reason was viewed as tantamount to risking the company's assets in a gambling casino.

89 MAINTENANCE & TECHNOLOGY
FOR MUFFLERS, WAVES OF CHANGE – An electronic muffler reduces noise at least as effectively as a conventional one. But it's smaller, and promises to improve fuel efficiency significantly.

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IN THE NEXT ISSUE

Beware! Today's diesels are prone to choke to death on their own soot. In years past, soot from over-fueled or lugging diesels was simply blown out the stack, darkening the sky. In contrast, 1991-model diesels constantly generate and swallow soot, darkening the crankcase oil. Unchecked, this soot will form sludge, plug oil filters and, ultimately, destroy an engine.

Next month, CCJ examines a partial solution: superior oils formulated for low-emissions diesels. □

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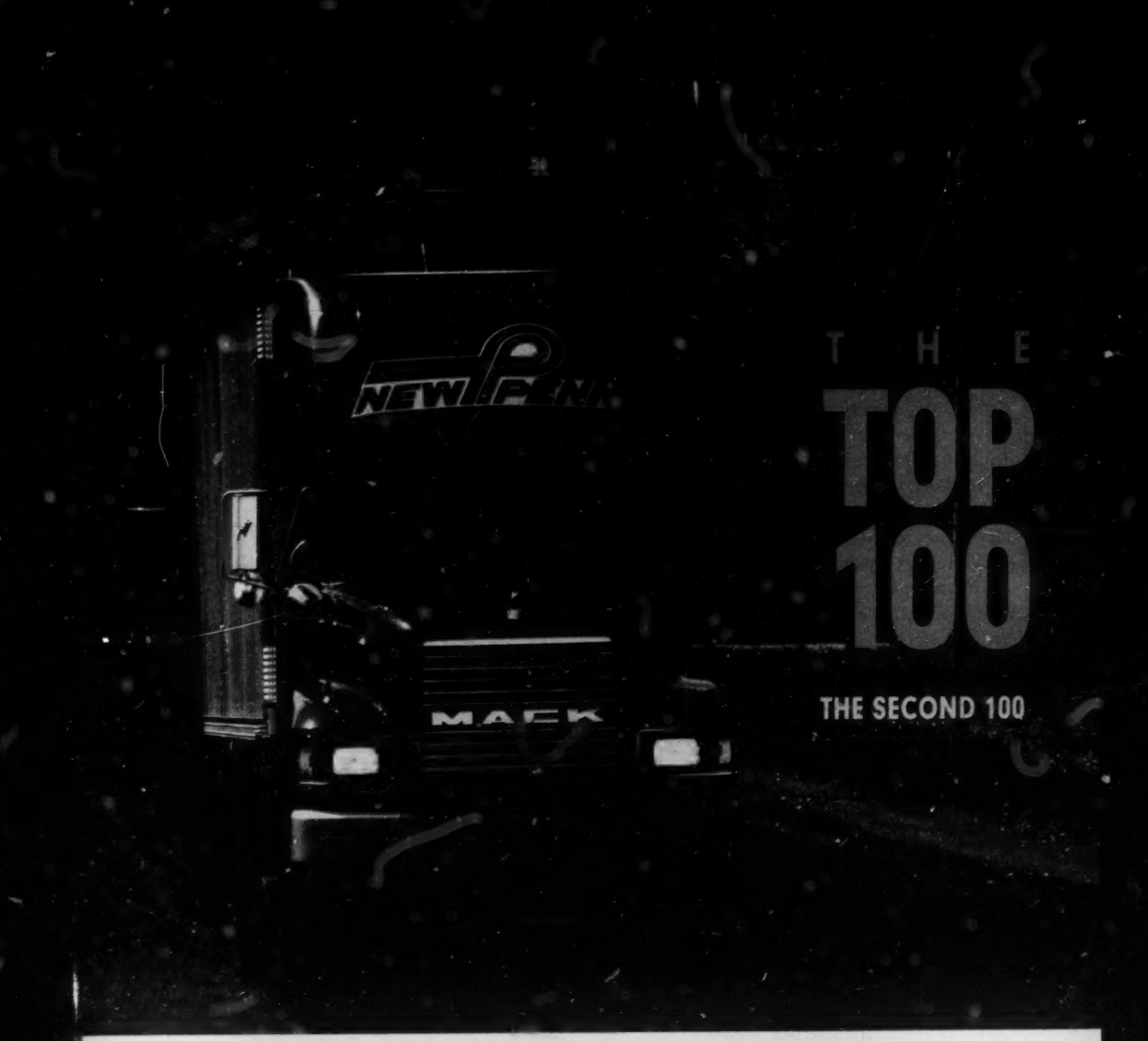


THE TOP 100

THE SECOND 100

Revenue rally refutes recession

A recession led by surging fuel prices usually causes competitors to stumble in trucking's annual race for revenues and profits. But most TOP 100 carriers cleared the hurdles, outpaced the GNP and posted increased revenues and profits in 1990.

By **PARRY DESMOND**
Executive Editor

Fleets whose operating ratio improved the most

Fleet	OR % point change
Missouri Nebraska Express (MNX), St. Joseph, Mo.	-8.0%
Spartan Express, Greer, S.C.	-6.6%
Marten Transport Ltd., Mondovi, Wisc.	-5.5%
Ryder Distribution Resources, Miami, Fla.	-5.2%
Universal AAm-Can Ltd., Warren, Mich.	-3.7%
Tri-State Motor Transit Co., Joplin, Mo.	-3.5%
Yellow Freight System, Overland Park, Kan.	-3.1%
Poole Truck Line, Evergreen, Ala.	-2.8%
Miller Transporters, Jackson, Miss.	-2.5%
Old Dominion Freight Line, High Point, N.C.	-2.5%
G.I. Trucking Co., La Mirada, Calif.	-2.4%
Commercial Carriers, Bloomfield Hills, Mich.	-2.2%
Graebel Van Lines, Wausau, Wisc.	-2.2%
Matlack, Wilmington, Del.	-2.1%
Contract Freighters, Joplin, Mo.	-2.0%

Fleets with best post-tax net profit margin

Fleet	Post-tax net profit margin
New Penn Motor Express, Lebanon, Pa.	15.36%
Koch Service, Wichita, Kan.	10.29%
Southeastern Freight Lines, Columbia, S.C.	9.33%
Contract Freighters, Joplin, Mo.	8.97%
Overnite Transportation Co., Richmond, Va.	6.99%
TNT Holland Motor Express, Holland, Mich.	6.73%
AAA Cooper Transportation, Dothan, Ala.	6.33%
Con-Way Transportation Svcs., Portland, Ore.	6.15%
Werner Enterprises, Omaha, Neb.	5.90%
Crete Carrier Corp., Lincoln, Neb.	5.76%
A-P-A Transport Corp., North Bergen, N.J.	5.75%
SAIA Motor Freight Line, Houma, La.	5.28%
Northwest Trpt. Service, Commerce City, Colo.	5.20%
J.B. Hunt Transport, Lowell, Ark.	5.18%
M.S. Carriers, Memphis, Tenn.	5.16%

When an industry's annual race for revenues is slowed by the start of a recession that cuts into freight volume and surging fuel costs not totally neutralized by surcharges, there's little reason to expect a strong economic performance that year. Despite those problems, 1990 was a comparatively good year for common carriers ranked in CCJ's TOP 100, based on annual revenues.

It was a year that saw the operating ratio king hold onto its crown and a comeback by a fleet that almost went down for the count in 1989.

TOP 100 outperformed GNP

While the nation's gross national product (GNP) rose by 5.0% last year, aggregate revenues posted in 1990 by the TOP 100 for-hire fleets increased by 7.4%, and their expenses were up 7.3%.

As a result, the TOP 100's average operating ratio (OR) for 1990 was 95.6. Their average OR for 1989 was 96.7.

And the nation's perennial four largest LTL fleets—United Parcel Service, Yellow Freight, Consolidated Freightways and Roadway Express—continued to dominate the market with 49.5% of the TOP 100's total revenues.

When CCJ started ranking the leading common carriers in 1968, the combined revenues of UPS, Yellow, CF and Roadway only garnered 19.5% of the TOP 100's total revenues.

The four leaders' aggregate 1990 revenues, up 7.6% over the previous year, and 95.3 OR were slightly better than the TOP 100's averages.

When broken down by fleet type, the less-than-truckload, truckload, tank truck and refrigerated fleets all improved their ORs and net profit margins in 1990, compared to the previous year.

However, the lagging housing and automobile markets created

Less-Than-Truckload Common Carriers of General Freight

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Net Profit Margin	Salaries, Wages & Fringes
AAA COOPER TRANSPORTATION, DOTHAN, AL	$ 157863	$ 140470	$ 17393	$ 5886	$ 9996	89.0	6.33%	$ 88680
ABF FREIGHT SYSTEM INC, FORT SMITH, AR	750892	714241	36652	8348	1097	95.1	0.15%	482176
A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	141852	131365	10486	2279	8161	92.6	5.75%	87985
ADVANCE TRANSPORTATION CO., MILWAUKEE, WI	114289	110185	4104	2019	1288	96.4	1.13%	69133
ANR FREIGHT SYSTEM, INC., DENVER, CO	169031	238104	(69073)	5604	(50742)	140.9	-30.02%	151845
ARKANSAS FREIGHTWAYS, HARRISON, AR	142952	129181	13770	2799	6999	90.4	4.90%	62975
AVERITT EXPRESS, COOKEVILLE, TN	142657	133947	8709	2600	3636	93.9	2.55%	69830
CAROLINA FREIGHT CARRIERS, CHERRYVILLE, NC	572222	563288	8934	4328	840	98.4	0.15%	380010
CENTRAL FREIGHT LINES, INC., WACO, TX	226418	218386	8032	2112	5383	96.5	2.38%	151964
CENTRAL TRANSPORT, INC., WARREN, MI	265263	264201	1062	2375	(642)	99.6	-0.24%	53318
CHURCHILL TRUCK LINES, CHILLICOTHE, MO	160999	157984	3015	317	2270	98.1	1.41%	96670
CON-WAY TRANSPORTATION SVCS., PORTLAND, OR	484838	430536	54302	610	29804	88.8	6.15%	277595
CONSOLIDATED FREIGHTWAYS, PORTLAND, OR	2080784	1980360	100424	10887	59501	95.2	2.86%	1301603
FORE WAY EXPRESS, INC., WAUSAU, WI	67469	66935	534	219	191	99.2	0.28%	31743
G.I. TRUCKING COMPANY, LA MIRADA, CA	103815	98316	5498	2688	1568	94.7	1.51%	48304
HYMAN FREIGHTWAYS, INC., MOUNDS VIEW, MN	103637	102598	1039	815	464	99.0	0.45%	51073
JONES TRUCK LINES, INC., SPRINGDALE, AR	239946	237546	2400	8466	(5186)	99.0	-2.16%	168660
MERCHANTS FAST MOTOR LINES, ABILENE, TX	103168	101773	1395	91	693	98.6	0.67%	60900
NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	125025	99119	25905	59	19209	79.3	15.36%	69765
NORTHWEST TRPT. SERVICE, COMMERCE CITY, CO	223054	204891	18163	23	11608	91.9	5.20%	127567
OLD DOMINION FREIGHT LINES, HIGH POINT, NC	147319	136380	10938	3720	4376	92.6	2.97%	67869
OVERNITE TRANSPORTATION CO., RICHMOND, VA	801832	726421	75411	719	56044	90.6	6.99%	485304
PRESTON TRUCKING COMPANY, INC., PRESTON, MD	404564	398894	5670	5024	770	98.6	0.19%	276750
ROADWAY EXPRESS, INC., AKRON, OH	1965196	1873687	91509	2633	58686	95.3	2.99%	1271666
SAIA MOTOR FREIGHT LINE, HOUMA, LA	102553	88281	14272	4423	5414	86.1	5.28%	50182
ST. JOHNSBURY TRUCKING CO., HOLLISTON, MA	331883	315488	16395	3941	5445	95.1	1.64%	228379
SOUTHEASTERN FREIGHT LINES, COLUMBIA, SC	154422	139972	14449	534	14408	90.6	9.33%	88960
SPARTAN EXPRESS, INC., GREER, SC	78595	81981	(3386)	1893	(3488)	104.3	4.44%	36979
TNT HOLLAND MOTOR EXPRESS, HOLLAND, MI	250870	222876	27994	0	16888	88.8	6.73%	158490
TNT RED STAR EXPRESS LINES, AUBURN, NY	158873	154783	4090	275	2116	97.4	1.33%	113291
TRANSUS, INC., ATLANTA, GA	80370	79337	1033	0	1170	98.7	1.46%	39111
UNITED PARCEL SERVICE-OH, GREENWICH, CT	7908781	7411200	497581	196	329698	93.7	4.17%	5193547
UNITED PARCEL SERVICE-NY, GREENWICH, CT	2958831	2958229	601	20	(4321)	100.0	-0.15%	2100335
VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	223495	202885	20611	1417	9074	90.8	4.06%	132128
WATKINS MOTOR LINES, INC., LAKELAND, FL	246551	231115	15436	83	6095	93.7	2.47%	98560
WILLIG FREIGHT LINES, SAN FRANCISCO, CA	81367	77807	3560	2923	203	95.6	0.25%	52358
YELLOW FREIGHT SYSTEM, OVERLAND PARK, KS	2278540	2168281	110259	10916	63025	95.2	2.77%	1497835
TOTAL: LTL GENERAL FREIGHT	$24550216	$23391043	$1159167	$101202	$671741	95.3	2.74%	$15723540

(all dollar amounts in thousands)

Fuel Oil & Lubricants	Parts, Tires Maintenance & Other	General Supplies & Expenses	Operating Taxes & Licenses	Insurance Expenses	Depreciation & Asset Disposition	Vehicle Rents/Purch. Transportation	Equipment Operated			
							Trucks Owned	Tractors Owned	Trailers Owned	Vehicles Leased
$ 7756	$ 8033	$ 9969	$ 4699	$ 4678	$ 9045	$ 7610	67	889	1773	74
37888	28529	72416	26264	13346	32125	21497	110	3526	12164	0
4307	7320	16642	2615	4701	6657	1138	394	514	1571	0
4779	6151	6951	3820	2845	2580	13926	13	460	1380	237
8952	11017	27699	8404	5182	3843	21162	14	706	3529	418
6485	3329	33309	4822	5156	8669	4436	33	1004	2298	0
11858	6236	16881	2894	1876	8950	15422	56	287	2174	628
21600	27395	35912	16917	15838	30036	35580	115	3165	9199	0
11067	11847	14767	9299	5352	11203	2387	743	1764	4251	0
160	901	11406	2653	5305	733	189725	0	0	0	723
7873	12335	9227	5569	3476	5516	1[illegible]318	26	1011	2174	0
19681	21011	52721	17446	12492	25712	3878	38	2384	5994	516
87920	111755	158971	67877	56512	87408	108314	107	7665	26666	893
1216	2702	5266	1075	1173	1708	22052	0	220	538	133
2324	3897	10299	2705	3070	4341	23376	72	496	1431	26
3227	4260	29795	2758	2208	2437	6840	26	313	1790	144
12099	7204	25461	7410	3712	4344	8656	35	1042	2660	300
5024	6010	15448	3714	2616	481	7580	0	0	1970	1039
3618	6121	8369	3279	2757	4484	806	57	520	1122	0
10080	10878	28590	7510	3880	503	15883	48	1041	4663	136
6987	7691	14221	4281	7200	5731	22400	21	700	2429	158
47965	45582	44309	35213	21475	26262	20311	133	5425	13662	0
16018	24909	29062	13021	8417	14132	16585	39	2189	5931	0
76705	110864	146157	62110	46094	101173	58918	287	9156	28299	0
4626	3874	6608	4313	3054	5596	10028	9	688	1472	0
12473	16191	21773	8928	7471	8039	12234	118	1401	3444	0
6474	9069	14117	4512	3736	7368	5736	49	979	2569	0
2365	9542	2918	2038	2165	3900	22074	30	350	NA	0
12915	14294	9592	9010	3629	6925	8021	3	1059	1961	0
5327	8922	11245	4692	2828	5012	3466	126	664	1453	69
3408	5724	6069	1877	3176	1497	18475	34	555	1164	164
151433	362266	832549	103759	121624	257917	388105	44492	5701	20504	0
49538	126975	363573	34766	56356	101687	124999	18318	2392	1935	0
8890	8623	22984	7781	6408	13015	3056	44	1207	4205	0
5639	11054	27509	4961	8338	3991	71063	0	20	3308	1152
3825	6019	4767	3634	1597	4991	616	100	532	1237	0
96557	124803	150323	73974	52578	128725	43486	326	9990	34386	32
$779059	$1193333	$2297875	$580600	$512321	$946656	$1357659	66083	70015	215306	6842

Tons Carried	Intercity Mileage				Average Haul (Miles)	Linehaul Cost/Mile	Tons Carried		Shipments		Average Load (in Tons)
	Total Mileage	Owned Vehicles	Leased Vehicles	Intermodal Mileage			Tons LTL	Tons TL	LTL	TL	
1050	42634	41017	0	1618	335	$0.93	846	203	2039	22	8.0
3025	238278	225308	2647	10322	1157	$1.11	2326	700	4779	82	14.1
746	14618	14618	0	0	248	$1.59	611	135	1633	13	12.6
1087	30249	17888	12361	0	262	$1.23	594	493	1095	40	9.4
1415	61313	43611	10210	7492	444	NA	697	718	1524	51	9.0
937	40006	36953	2463	590	395	$0.93	766	171	1668	26	9.2
1517	68435	19438	48997	0	708	$0.70	760	757	1455	59	15.7
1524	167777	139015	899	27863	1411	$1.07	2006	518	4709	58	10.5
2863	64240	63128	0	1112	209	$0.99	1205	1658	3228	107	9.1
4453	79263	73	79190	0	148	NA	2546	1907	4374	181	8.3
867	49480	40273	6188	3018	641	$1.15	661	205	1224	23	10.4
3037	95143	84885	10258	0	281	$1.40	2453	583	5227	71	9.0
7331	640340	508389	87543	44316	1378	$1.26	5688	1643	13317	186	14.4
553	15771	3299	12471	0	241	$1.24	382	171	782	18	8.5
438	30250	6429	11779	12042	951	NA	356	82	929	10	13.8
652	27558	18711	6898	1949	439	$1.18	473	179	1025	17	9.7
1571	70435	70435	0	0	402	NA	1231	340	2443	38	9.0
1126	29241	0	29241	0	272	$1.17	497	629	1166	43	10.5
727	17377	17377	0	0	216	NA	584	143	1218	16	9.0
887	69221	0	67811	1410	1354	$1.21	621	266	1334	26	17.0
1080	50835	39782	11053	0	319	$0.95	586	494	1239	65	6.8
4916	292910	282982	0	9928	683	$0.92	3363	1553	7309	147	11.0
2423	91921	84398	0	7523	363	$1.21	1776	648	3651	76	8.4
7114	559098	503475	298	55325	1197	$1.22	5528	1585	13130	184	14.0
940	27653	27653	0	0	259	$0.99	533	406	1167	32	8.8
1982	60384	60384	0	0	290	$1.23	1471	511	3435	48	9.5
1346	31030	27842	0	3189	265	$0.93	921	428	2047	42	10.3
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
1984	59919	59919	0	0	261	$1.25	1512	472	2572	55	8.6
830	22086	22086	0	0	200	$1.37	724	106	1851	13	7.5
10797	29278	12692	11166	5419	327	$0.92	402	677	884	45	9.1
}12232	}1747560	}1735021	} 12539	} NR	} NA	} NA	}12232	} 0	}2772406	} 0	} NA
1191	46808	46808	0	0	436	$1.19	843	348	2162	39	11.1
823	101263	50770	50492	0	1545	$0.87	643	179	1288	23	12.6
540	17966	17912	54	0	436	NA	366	175	703	17	13.1
8390	671102	632941	261	37900	1268	$1.13	6852	1538	15245	203	15.0
82678	5661442	4955512	474819	231016	744	$1.14	63055	20621	2884258	2076	12.6

Other Trucking Segments

(all dollar amounts in thousands)

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Net Profit Margin	Salaries, Wages & Fringes	Fuel Oil & Lubricants
TRUCKLOAD GENERAL FREIGHT									
ACE TRANSPORTATION, INC., LAFAYETTE, LA	$ 125527	$ 123984	$ 1544	$ 1218	$ 1041	98.8	0.83%	$ 103,212	$ 204
BUILDERS TRANSPORT, CAMDEN, SC	240756	234383	6373	11916	(7759)	97.4	-3.22%	94296	34721
BURLINGTON MOTOR CARRIERS, INC., HURST, TX	235231	222433	12798	NA	NA	94.6	NA	81024	42329
CRETE CARRIER CORP., LINCOLN, NE	131366	124330	7035	601	7565	94.6	5.76%	25938	12584
DART TRANSIT COMPANY, EAGAN, MN	97083	92440	4643	1541	2884	95.2	2.97%	5799	0
C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	97191	89995	7196	3504	3731	92.6	3.84%	34369	16322
FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	86086	77988	8098	4652	2052	90.6	2.38%	26489	15825
J.B. HUNT TRANSPORT, INC., LOWELL, AR	579831	522971	56860	7220	30048	90.2	5.18%	239956	101484
JONES MOTOR COMPANY, SPRING CITY, PA	64890	65918	(1028)	29	(692)	101.6	-1.07%	12022	0
LIGON NATIONWIDE, INC., MADISONVILLE, KY	104855	102394	2461	0	(58)	97.7	-0.06%	6279	0
M.S. CARRIERS, INC., MEMPHIS, TN	123577	110453	13124	2524	6382	89.4	5.16%	42750	19712
MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	70986	70631	355	261	159	99.5	0.22%	2476	1
MISSOURI NEBRASKA EXPRESS, ST. JOSEPH, MO	198920	195389	3532	3441	220	98.2	0.11%	48046	22051
MUNSON TRANSPORTATION, MONMOUTH, IL	107850	103244	4606	5519	(678)	95.7	-0.63%	38182	15391
NATIONAL FREIGHT, INC., VINELAND, NJ	123693	123384	309	4945	(4640)	99.8	-3.75%	34166	9595
NEW PRIME, INC., SPRINGFIELD, MO	98633	91309	7324	3777	3429	92.6	3.48%	7280	328
ROBERSON TRPTN CO., PFT/CX, FARMER CITY, IL	83715	81919	1796	887	1762	97.9	2.10%	12735	9257
RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	236845	230122	6723	2938	2597	97.2	1.10%	20759	0
ROADRUNNER TRUCKING, ALBUQUERQUE, NM	82794	79520	3274	1250	1187	96.0	1.43%	21446	12680
RYDER DISTRIBUTION RESOURCES, MIAMI, FL	314735	303401	11334	0	6094	96.4	1.94%	155247	36582
SIGNAL DELIVERY SERVICE, CLEVELAND, OH	211593	203444	8149	4666	(313)	96.1	-0.15%	123851	14266
UNIVERSAL AM-CAN, LTD., WARREN, MI	105635	104334	1301	215	98	98.8	0.09%	11513	262
WERNER ENTERPRISES, OMAHA, NE	305134	272,089	33044	4072	18013	89.2	5.90%	112886	45515
TOTAL: TRUCKLOAD GENERAL FREIGHT	$3826926	$3626075	$200851	$65176	$73122	94.8	2.04%	$1260721	$409109
TANK TRUCK									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	$ 210871	$ 205266	$ 5604	$ 5783	$ 1101	97.3	0.52%	$ 69847	$ 7275
DSI TRANSPORTS, INC., HOUSTON, TX	76486	70068	6418	1321	3814	91.6	4.99%	34123	5938
GROENDYKE TRANSPORT, INC., ENID, OK	85787	82203	3584	1720	2112	95.8	2.46%	34552	4672
KOCH SERVICE, INC., WICHITA, KS	102111	87112	15000	0	10504	85.3	10.29%	36893	12145
MATLACK, INC., WILMINGTON, DE	216685	209732	6954	5833	665	96.8	0.31%	79713	11245
MILLER TRANSPORTERS, INC., JACKSON, MS	75929	75143	785	1293	(197)	99.0	-0.26%	32452	4666
MONTGOMERY TANK LINES, INC., PLANT CITY, FL	126563	115316	11247	8010	2081	91.1	1.64%	17854	2990
TOTAL: TANK TRUCK	$ 894432	$ 844840	$ 49592	$23960	$20080	94.5	2.25%	$ 305434	$ 48931
MOTOR VEHICLE CARRIERS									
ALLIED SYSTEMS "LTD.," DECATUR, GA	$ 199579	$ 199204	$ 375	$ 4132	$(3888)	99.8	-1.95%	$ 109280	$ 14090
ANCHOR MOTOR FREIGHT, BIRMINGHAM, MI	231315	231998	(683)	3254	(5816)	100.3	-2.51%	124523	18872
CASSENS TRANSPORT CO., EDWARDSVILLE, IL	74969	76631	(1662)	541	(1447)	102.2	-1.93%	40777	5637
COMMERCIAL CARRIERS, BLOOMFIELD HILLS, MI	204385	198915	5470	147	3077	97.3	1.51%	107044	12320
COMPLETE AUTO TRANSIT, BLOOMFIELD HILLS, MI	217058	211485	5573	1412	4127	97.4	1.90%	106337	14239
JACK COOPER TRPT. CO., OKLAHOMA CITY, OK	79509	77503	2005	1519	(342)	97.5	-0.43%	48402	5555
DALLAS & MAVIS FORWARDING, KENOSHA, WI	74243	71934	2309	26	1479	96.9	1.99%	29264	4318
E&L TRANSPORT COMPANY, WAYNE, MI	85735	94032	(8298)	10	(5244)	109.7	-6.12%	44866	4946
M&G CONVOY, INC., BUFFALO, NY	92817	95952	(3135)	851	(1899)	103.4	-2.05%	46887	4751
NU-CAR CARRIERS, INC., BIRMINGHAM, MI	73896	79824	(5928)	3703	(9631)	108.0	-13.03%	37909	5071
TOTAL: MOTOR VEHICLE CARRIERS	$1333906	$1337478	$ (3974)	$15595	$(19584)	100.3	-1.47%	$ 695289	$ 89799
REFRIGERATED COMMODITIES									
FFE TRANSPORTATION SERVICE, DALLAS, TX	$ 130908	$ 128212	$ 2696	$ 2153	$ 1440	97.9	1.10%	$ 14786	$ 1784
KLLM TRANSPORT SERVICES, INC., JACKSON, MS	125759	116617	9142	4401	2768	92.7	2.20%	40463	23046
MARTEN TRANSPORT, LTD., MONDOVI, WI	81349	75962	5387	2853	1792	93.4	2.20%	29480	16112
MIDWEST COAST TRANSPORT, SIOUX FALLS, SD	79261	76336	2925	1426	1537	96.3	1.94%	5427	323
NATIONAL CARRIERS, INC., LIBERAL, KS	76248	73079	3169	1615	1169	95.8	1.53%	4996	596
TOTAL: REFRIGERATED COMMODITIES	$ 493525	$ 470206	$ 23319	$12448	$ 8706	95.3	1.76%	$ 95152	$ 41861
OTHER SPECIALIZED CARRIERS									
ANDERSON TRUCKING SERVICE, ST CLOUD, MN	$ 113204	$ 107738	$ 5467	$ 1761	$ 2333	95.2	2.06%	$ 21765	$ 9210
CONTRACT FREIGHTERS, INC., JOPLIN, MO	119864	104885	14978	4701	10749	87.5	8.97%	42483	16317
JACK GRAY TRANSPORT, INC., GARY, IN	74530	72328	2202	697	3219	97.0	4.32%	10840	2105
INDEPENDENT FREIGHTWAY, ROCKFORD, IL	154877	148899	5978	1831	2305	96.1	1.49%	6955	0
MERCHANTS HOME DELIVERY, OXNARD, CA	96236	88057	8179	316	4300	91.5	4.47%	12050	46
MORGAN DRIVE AWAY, INC., ELKHART, IN	65950	64337	1613	239	929	97.6	1.41%	5607	30
PAULS TRUCKING CORPORATION, AVENEL, NJ	67573	67045	528	0	326	99.2	0.48%	25185	3809
POOLE TRUCK LINE, INC., EVERGREEN, AL	110734	107036	3698	4582	(2659)	96.7	-2.40%	46857	16829
SWIFT TRANSPORTATION CO., INC., PHOENIX, AZ	156330	140808	15522	5070	6656	90.1	4.26%	57759	20670
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	116192	110426	5766	3973	808	95.0	0.70%	39979	7587
TOTAL: OTHER SPECIALIZED CARRIERS	$1075490	$1011559	$ 63931	$23170	$28966	94.1	2.69%	$ 269480	$ 76603

Parts, Tires, Maintenance & Other	General Supplies & Expenses	Operating Taxes & Licenses	Insurance Expenses	Depreciation & Asset Disposition	Vehicle Rents/Purch. Transportation	Equipment Operated				Tons Carried	Vehicle Mileage
						Trucks Owned	Tractors Owned	Trailers Owned	Vehicles Leased		
$ 4219	$ 7592	$ 1599	$ 6393	$ 765	—	NA	NA	NA	NA	NA	43723
21285	23252	23343	12092	19644	$ 5750	0	1931	2863	552	7031	222806
20936	12328	7252	13156	14002	31406	0	1083	3845	874	3053	224270
5802	3232	2017	4505	6403	63849	0	581	1662	0	2531	123383
5922	3520	1356	2225	2900	70718	0	0	1551	959	1187	90379
7571	3137	8598	3125	4175	12698	0	4	1168	70	927	103339
6160	7964	4030	4246	6517	6757	0	683	838	27	941	82659
46926	28526	18506	31127	56348	98	0	4897	10347	0	8058	541079
313	9919	922	3129	148	39465	0	0	1	622	1181	45000
871	8979	13	5179	961	80112	0	6	1410	926	2025	83099
6735	13041	4124	7245	15897	949	0	1056	2440	0	1676	108311
1014	8685	106	3994	90	54265	0	0	0	1025	2187	61459
15159	1822	4585	5667	11499	86560	0	23	1909	758	1057	102635
12602	8168	10345	5371	11817	1368	6	850	1661	0	2338	101930
9897	7481	9773	4790	11688	35994	0	1102	3951	0	1229	108377
3542	3634	386	1789	7304	67046	0	341	766	0	1655	90751
3912	10468	2818	4843	1919	35967	0	400	1100	600	NA	81058
5024	22977	1126	4174	1819	174243	0	0	2023	0	NA	168726
8630	4755	3350	3530	5120	20009	0	519	1064	73	1234	80153
12146	17083	907	8570	1130	71736	6	7	2142	2221	3188	102445
12315	19999	9615	6427	14049	2922	5	1339	5828	0	NA	108996
1357	10136	972	2894	3258	73942	5	265	743	0	2468	62479
20239	12244	28590	14865	36795	955	0	2437	5260	23	4045	289619
$232577	$248942	$144333	$159336	$234248	$936809	22	17524	52572	8730	48011	3026676
$ 21745	$ 13096	$ 5113	$ 9653	$ 14708	$ 63829	0	613	2863	716	3726	90013
7235	8678	3879	2420	6283	1512	0	384	638	46	3859	45477
6221	4745	3377	6020	4991	17625	0	482	790	393	4222	58561
20063	2454	1990	4332	7774	1461	NA	NA	NA	NA	NA	54550
33778	17201	9649	7796	14430	35920	25	892	2736	435	6521	96594
7252	5361	3332	2730	3396	15954	0	461	901	157	2993	47167
7045	6931	1526	3175	7274	68521	0	207	2350	585	2399	75954
$103339	$ 58466	$ 28866	$ 36126	$ 58856	$204822	25	3039	10278	2332	23720	468316
$ 13588	$ 18650	$ 9772	$ 10100	$ 5498	$ 18226	0	438	1724	1151	2844	80586
17378	30886	4938	12248	21793	1360	0	1986	2379	89	2780	83180
6473	3552	4570	3988	4844	6790	0	427	84	324	1525	36452
16686	11009	10945	8172	13008	19731	0	1314	1590	239	3768	82380
17698	8535	9744	7608	20142	27182	0	1576	1519	0	2344	92269
8098	3443	4260	3227	3756	762	NA	NA	NA	NA	1221	31373
2734	14399	2400	1798	187	16834	0	0	0	262	967	41326
7691	7772	4171	3620	2718	18248	0	0	715	703	1174	31305
9378	3928	3719	6084	7499	13706	0	638	829	150	1214	33012
1926	11317	1793	5586	9670	6552	0	1072	1183	99	1526	24927
$101650	$113491	$ 56312	$ 62431	$ 89115	$129391	0	7451	10023	3017	19363	536810
$ 6044	$ 8141	$ 1072	$ 5778	$ 1419	$ 89188	0	739	1457	386	1360	76993
24043	4342	2434	8538	13751	0	0	910	1300	0	1778	113290
5781	3556	3217	4872	9743	3201	0	585	803	0	968	72820
1757	2312	108	2350	1138	62921	0	0	618	637	888	78729
2438	3989	755	2153	1027	57125	0	1	864	514	NA	72995
$ 40063	$ 22340	$ 7586	$ 23691	$ 27078	$212435	0	2235	5042	1537	4994	414832
$ 9573	$ 8072	$ 3474	$ 3294	$ 5670	$ 46680	14	357	2347	604	1017	96985
8115	5409	4303	2663	11922	13673	0	882	1268	127	1239	106208
1864	6089	1934	3201	1856	44439	0	72	377	0	4683	45455
1747	15830	151	4573	901	118742	0	0	291	1474	2049	118049
796	9958	117	8095	1016	55979	0	0	0	713	NA	NA
507	5265	3315	4678	1484	43451	17	0	268	0	792	50914
7403	3315	2069	2150	1192	21922	0	71	1973	254	3584	26354
8987	5822	11223	5173	2972	9172	0	487	2104	495	2155	117395
15641	8 [illegible]	7511	5749	12520	12209	0	1305	2585	0	NA	NA
6671	7 [illegible]	7404	4095	1752	35167	16	94	1554	906	904	89478
$ 61304	$ 76281	$ 41501	$ 43671	$ 41285	$401434	47	3268	12767	4573	16423	650838

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Interest Expense	Net Income	Operating Ratio	Net Profit Margin
HOUSEHOLD GOODS							
ALLIED VAN LINES, INC., NAPERVILLE, IL	$ 398580	$ 393027	$ 5553	$ 5604	$5206	98.6	1.31%
ATLAS VAN LINES, INC., EVANSVILLE, IN	216679	201794	14885	10574	2402	93.1	1.11%
BEKINS VAN LINES CO., HILLSIDE, IL	212704	207985	4719	316	3192	97.8	1.50%
BURNHAM SERVICE CO., INC., COLUMBUS, GA	92513	89506	3007	0	1828	96.7	1.98%
GRAEBEL VAN LINES, INC., WAUSAU, WI	94175	91541	2634	466	1236	97.2	1.31%
MAYFLOWER TRANSIT, INC., CARMEL, IN	310477	307518	2960	6963	1953	99.0	0.63%
NORTH AMERICAN VAN LINES, INC., FT. WAYNE, IN	775648	791317	(15669)	10390	(9052)	102.0	-1.17%
UNITED VAN LINES, INC., FENTON, MO	473497	471793	1704	2866	880	99.6	0.19%
TOTAL: HOUSEHOLD GOODS	$2574273	$2554481	$19793	$37179	$7645	99.2	0.30%

Definitions and Explanations Of Financial Terminology Used On The Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition of Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment; amortization of: improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc.; gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for: furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

problems for the specialized fleets that service them.

Thus, household goods and car carriers in the Top 100 recorded average ORs of 99.2 and 100.3, respectively.

New Penn Motor Express

For the third time in four years, New Penn Motor Express of Lebanon, Pa., had the lowest OR—79.3—among the TOP 100 carriers. That's the lowest OR tallied by a TOP 100 carrier since J.B. Hunt's 75.4 in 1984.

New Penn's revenues were up 10.4% over 1989 and its expenses increased by 9.3%, resulting in a net operating profit that improved by 14.4%. The northeastern LTL carrier also led the TOP 100 with a 15.36% net profit margin.

Edward H. Arnold, New Penn president, says one of the reasons for the company's success is a computerized "life document" that's constantly updated so customer service representatives can meet clients' information needs immediately. In addition to the status and charges for each shipment, the "document" provides New Penn personnel with immediate access to clients' claims information and payment history.

Arnold says the company has no formal budget. But, he says, each of New Penn's 19 terminals is expected to show dollar and percentage improvements in monthly, quarterly and annual performances.

"We believe....it is better to do 100 things 1% better than one thing 100% better," claims Arnold. "Our goals is not to be the biggest...it's to be the best."

Comeback story

Missouri Nebraska Express (MNX) provided the TOP 100 comeback story. In 1989, the St. Joseph, Mo., truckload carrier had a $-7.6 million operating loss and a 106.2 OR. Text continues on page 71

Fleets whose post-tax net income increased the most

Fleet	Net income by % point change
Missouri Nebraska Express (MNX), St. Joseph, Mo.	6.06
Spartan Express, Greer, S.C.	4.56
Marten Transport Ltd., Mondovi, Wisc.	4.11
Ryder Distribution Resources, Miami, Fla.	3.60
AAA Cooper Transportation, Dothan, Ala.	2.46
DSI Transports, Houston, Tex.	2.16
Universal Am-Can Ltd., Warren, Mich.	2.15
Miller Transporters, Jackson, Miss.	2.14

Fleets whose annual revenues improved the most

Fleet	Revenue % change
Missouri Nebraska Express (MNX), St. Joseph, Mo.	61.0%
Arkansas Freightways Corp., Harrison, Ark.	46.5%
Ace Transportation, Lafayette, La.	40.6%
Roberson Trptn. Cos., Pft/Cx, Farmer City, Ill.	40.0%
C.R. England & Sons, Salt Lake City, Ut.	31.6%
M.S. Carriers, Memphis, Tenn.	27.6%
Con-Way Transportation Services, Portland, Ore.	26.5%
Swift Transportation Co., Phoenix, Ariz.	26.4%
Averitt Express, Cookeville, Tenn.	26.1%
New Prime, Springfield, Mo.	25.5%
Freymiller Trucking, Bakersfield, Calif.	24.5%
G.I. Trucking Co., La Mirada, Calif.	23.2%
Northwest Transport Service, Commerce City, Colo.	22.9%
FFE Transportation Service, Dallas, Tex.	22.1%
TNT Holland Motor Express, Holland, Mich.	21.6%
Werner Enterprises, Omaha, Neb.	21.3%
Watkins Motor Lines, Lakeland, Fla.	21.0%
Universal Am-Can Ltd., Warren, Mich.	20.2%
Montgomery Tank Lines, Plant City, Fla.	19.9%
SAIA Motor Freight Line, Houma, La.	19.8%
Southeastern Freight Lines, Columbia, S.C.	19.3%
Ligon Nationwide, Madisonville, Ky.	19.2%
ABF Freight System, Fort Smith, Ark.	19.2%
Crete Carrier Corp., Lincoln, Neb.	17.5%
Midwest Coast Transport, L.P., Sioux Falls, S.D.	16.6%

TOP 100

(all dollar amounts in thousands)

1990 Revenue Rank	Fleet Name, City, State	Carrier Type	1990 Gross Revenues	1989 Gross Revenues	1989 Revenue Rank	Operating Ratio 1990	Rank	1989	Rank
1	UNITED PARCEL SERVICE (OHIO), GREENWICH, CT	CMGF	$7908781	$7249363	1	93.7	28 T	94.1	31
2	UNITED PARCEL SERVICE (NEW YORK), GREENWICH, CT	CMGF	2958831	2803091	2	100.0	91	98.5	72
3	YELLOW FREIGHT SYSTEM, INC., OVERLAND PARK, KS	CMGF	2278540	2189638	3	95.2	37 T	98.3	71
4	CONSOLIDATED FREIGHTWAYS CORP. (DEL), PORTLAND, OR	CMGF	2080784	1894950	4	95.2	37 T	95.0	38
5	ROADWAY EXPRESS, INC., AKRON, OH	CMGF	1965196	1835496	5	95.3	41	95.4	44
6	OVERNITE TRANSPORTATION CO., RICHMOND, VA	CMGF	801832	697783	7	90.6	13 T	91.0	18
7	NORTH AMERICAN VAN LINES, INC., FORT WAYNE, IN	CMHG	775648	792190	6	102.0	94	100.0	86
8	ABF FREIGHT SYSTEM, INC., FORT SMITH, AR	CMGF	750892	630144	9	95.1	35 T	96.9	54
9	J.B. HUNT TRANSPORT, INC., LOWELL, AR	CMGF	579831	509278	11	90.2	11	87.9	10
10	CAROLINA FREIGHT CARRIERS CORP., CHERRYVILLE, NC	CMGF	572222	538889	10	98.4	73	98.6	74
11	CON-WAY TRANSPORTATION SERVICES, PORTLAND, OR	CMGF	484838	383418	15	88.8	5 T	85.8	5
12	UNITED VAN LINES, INC., FENTON, MO	CMHG	473497	468023	12	99.6	87 T	99.2	79
13	PRESTON TRUCKING COMPANY, INC., PRESTON, MD	CMGF	404564	366938	16	98.6	74 T	98.8	76
14	ALLIED VAN LINES, INC., NAPERVILLE, IL	CMHG	398580	405968	14	98.6	74 T	97.5	64
15	ST. JOHNSBURY TRUCKING CO., INC., HOLLISTON, MA	CMGF	331883	313552	18	95.1	35 T	91.1	19
16	RYDER DISTRIBUTION RESOURCES, INC., MIAMI, FL	CMGF	314735	281502	19	96.4	50 T	101.6	90
17	MAYFLOWER TRANSIT, INC., CARMEL, IN	CMHG	310477	320772	17	99.0	80 T	97.4	62
18	WERNER ENTERPRISES, INC., OMAHA, NE	CMGF	305134	251575	22	89.2	8	87.4	8
19	CENTRAL TRANSPORT, INC., WARREN, MI	CMGF	265263	278816	20	99.6	87 T	99.7	84
20	TNT HOLLAND MOTOR EXPRESS, INC., HOLLAND, MI	CMGF	250870	206241	34	88.8	5 T	89.6	13
21	WATKINS MOTOR LINES, INC., LAKELAND, FL	CMGF	246551	203677	35	93.7	28 T	95.1	40
22	BUILDERS TRANSPORT, INC., CAMDEN, SC	CMGF	240756	228229	25	97.3	60 T	98.2	70
23	JONES TRUCK LINES, INC., SPRINGDALE, AR	CMGF	239946	218093	27	99.0	80 T	96.9	54
24	RANGER TRANSPORTATION, INC., JACKSONVILLE, FL	CMGF	236845	203245	36	97.2	58 T	97.3	59
25	BURLINGTON MOTOR CARRIERS, INC., HURST, TX	CMGF	235231	NA	NR	94.6	31	NA	NR
26	ANCHOR MOTOR FREIGHT, INC., BIRMINGHAM, MI	CTMV	231315	256629	21	100.3	92	96.5	53
27	CENTRAL FREIGHT LINES, INC., WACO, TX	CMGF	226418	213259	29	96.5	52	94.6	37
28	VIKING FREIGHT SYSTEM, INC., SAN JOSE, CA	CMGF	223495	226074	26	90.8	16	90.9	15
29	NORTHWEST TRANSPORT SERVICE, COMMERCE CITY, CO	CMGF	223054	181519	39	91.9	20	93.7	28
30	COMPLETE AUTO TRANSIT, INC., BLOOMFIELD HILLS, MI	CTMV	217058	238955	23	97.4	62 T	96.4	49
31	MATLACK, INC., WILMINGTON, DE	CTLP	216685	214489	28	96.8	55	98.9	77
32	ATLAS VAN LINES, INC., EVANSVILLE, IN	CMHG	216679	208318	32	93.1	26	93.3	27
33	BEKINS VAN LINES COMPANY, HILLSIDE, IL	CMHG	212704	210892	30	97.8	68	97.8	65
34	SIGNAL DELIVERY SERVICE, INC., CLEVELAND, OH	CMSC	211593	230995	24	96.1	47 T	95.7	46
35	CHEMICAL LEAMAN TANK LINES, INC., EXTON, PA	CTLP	210871	207362	33	97.7	66 T	97.3	59
36	COMMERCIAL CARRIERS, INC., BLOOMFIELD HILLS, MI	CMMV	204385	210070	31	97.3	60 T	99.5	81
37	ALLIED SYSTEMS "LTD," DECATUR, GA	CMMV	199579	189870	38	99.8	90	97.8	65
38	MISSOURI NEBRASKA EXPRESS (MNX), ST. JOSEPH, MO	CMGF	198920	123586	49	98.2	72	106.2	97
39	ANR FREIGHT SYSTEM, INC., DENVER, CO	CMGF	169031	416348	13	140.9	100	105.3	96
40	CHURCHILL TRUCK LINES, INC., CHILLICOTHE, MO	CMGF	160999	145009	42	98.1	71	97.8	65
41	TNT RED STAR EXPRESS, INC., AUBURN, NY	CMGF	158873	146035	40	97.4	62 T	95.0	38
42	AAA COOPER TRANSPORTATION, DOTHAN, AL	CMGF	157863	136375	44	89.0	7	90.1	14
43	SWIFT TRANSPORTATION COMPANY, INC., PHOENIX, AZ	CMSC	156830	123714	NR	90.1	10	91.3	NR
44	INDEPENDENT FREIGHTWAY, INC., ROCKFORD, IL	CMSC	154877	145453	41	96.1	47 T	96.4	49
45	SOUTHEASTERN FREIGHT LINES, INC., COLUMBIA, SC	CMGF	154422	129389	47	90.6	13 T	91.8	22
46	OLD DOMINION FREIGHT LINE, INC., HIGH POINT, NC	CMGF	147319	127690	48	92.6	21 T	95.1	40
47	ARKANSAS FREIGHTWAYS CORP., HARRISON, AR	CMGF	142952	97593	65	90.4	12	92.0	23
48	AVERITT EXPRESS, INC., COOKEVILLE, TN	CMGF	142657	113097	52	93.9	30	92.9	26
49	A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	CMGF	141852	133347	45	92.6	21 T	92.8	25
50	CRETE CARRIER CORPORATION, LINCOLN, NE	CMGF	131366	111757	53	95.0	33 T	95.2	43

For Top 100 listings under "Type": BM-building materials; CM-common; CT-contracts; GF-general freight; ED-explosives/dangerous articles; FP-forest products; HG-household goods; HM-heavy machinery; LP-liquid petroleum products (included, in most cases, other bulk commodities); MV-motor vehicles; RS-retail-store delivery; SC-specific commodity not otherwise grouped.
T: Tie in Operating Ratio. NR: Not Ranked

(all dollar amounts in thousands)

1990 Revenue Rank	Fleet Name, City, State	Carrier Type	1990 Gross Revenues	1989 Gross Revenues	1989 Revenue Rank	Operating Ratio 1990	Rank	1989	Rank
51	FFE TRANSPORTATION SERVICE, INC., DALLAS, TX	CMRC	$130908	$107215	55	97.9	69 T	96.9	54
52	MONTGOMERY TANK LINES, INC., PLANT CITY, FL	CMLP	126563	105518	56	91.1	17	91.1	19
53	KLLM TRANSPORT SERVICES, INC., JACKSON, MS	CMRC	125759	115745	50	92.7	25	94.2	32
54	ACE TRANSPORTATION, INC., LAFAYETTE, LA	CMSC	125527	89271	73	98.8	78 T	97.4	62
55	NEW PENN MOTOR EXPRESS, INC., LEBANON, PA	CMGF	125025	113274	51	79.3	1	80.0	1
56	NATIONAL FREIGHT, INC., VINELAND, NJ	CMGF	123693	144405	43	99.7	89	96.4	49
57	M.S. CARRIERS, INC., MEMPHIS, TN	CMGF	123577	96813	66	89.4	9	84.1	3
58	CONTRACT FREIGHTERS, INC., JOPLIN, MO	CMSC	119864	110106	54	87.5	4	89.5	12
59	TRI-STATE MOTOR TRANSIT CO., JOPLIN, MO	CMSC	116192	104799	57	95.0	33 T	98.5	72
60	ADVANCE TRANSPORTATION COMPANY, MILWAUKEE, WI	CMGF	114289	102989	60	96.4	50 T	97.3	59
61	ANDERSON TRUCKING SERVICE, INC., ST. CLOUD, MN	CMSC	113204	103408	59	95.2	37 T	94.4	34
62	POOLE TRUCK LINE, INC., EVERGREEN, AL	CMHM	110734	104520	58	96.7	53 T	99.5	81
63	MUNSON TRANSPORTATION, INC., MONMOUTH, IL	CMGF	107850	99645	64	95.7	43	95.5	45
64	UNIVERSAL AM-CAN, LTD., WARREN, MI	CMGF	105635	87874	76	98.8	78 T	102.5	92
65	LIGON NATIONWIDE, INC., MADISONVILLE, KY	CMSC	104855	87970	NR	97.7	66 T	96.8	NR
66	G.I. TRUCKING COMPANY, LA MIRADA, CA	CMGF	103815	84258	78	94.7	32	97.1	57
67	HYMAN FREIGHTWAYS, INC., MOUNDS VIEW, MN	CMGF	103637	91144	69	99.0	80 T	98.0	68
68	MERCHANTS FAST MOTOR LINES, INC., ABILENE, TX	CMGF	103168	99785	63	98.6	74 T	98.6	74
69	SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	CMGF	102553	85617	77	86.1	3	86.2	7
70	KOCH SERVICE, INC., WICHITA, KS	CMLP	102111	92559	68	85.3	2	86.1	6
71	NEW PRIME, INC., SPRINGFIELD, MO	CMGF	98633	78599	86	92.6	21 T	89.4	11
72	C.R. ENGLAND & SONS, INC., SALT LAKE CITY, UT	CMRC	97191	73881	90	92.6	21 T	93.9	30
73	DART TRANSIT COMPANY, EAGAN, MN	CMGF	97083	90771	70	95.2	37 T	94.4	34
74	MERCHANTS HOME DELIVERY SERVICE, INC., OXNARD, CA	CMSC	96236	88467	75	91.5	18	90.9	15
75	GRAEBEL VAN LINES, INC., WAUSAU, WI	CMHG	94175	84132	79	97.2	58 T	99.4	80
76	M&G CONVOY, INC., BUFFALO, NY	CMMV	92817	101095	62	103.4	96	102.9	93
77	BURNHAM SERVICE COMPANY, INC., COLUMBUS, GA	CMHG	92513	93326	67	96.7	53 T	94.5	36
78	FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	CMGF	86086	69151	100	90.6	13 T	90.9	15
79	GROENDYKE TRANSPORT, INC., ENID, OK	CMLP	85787	79506	84	95.8	44 T	95.8	47
80	E&L TRANSPORT COMPANY (MI CORP), WAYNE, MI	CTMV	85735	102200	61	109.7	99	100.8	87
81	ROBERSON TRPTN. COS., PFT/CX, FARMER CITY, IL	CMGF	83715	59800	NR	97.9	69 T	97.5	NR
82	ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	CMGF	82794	81058	82	96.0	46	85.7	4
83	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	81367	79212	85	95.6	42	93.8	29
84	MARTEN TRANSPORT, LTD., MONDOVI, WI	CMRC	81349	73312	91	93.4	27	98.9	77
85	TRANSUS, INC., ATLANTA, GA	CMGF	80370	70536	96	98.7	77	99.5	81
86	JACK COOPER TRANSPORT CO., OKLAHOMA CITY, OK	CMMV	79509	88988	74	97.5	64	94.2	32
87	MIDWEST COAST TRANSPORT, L.P., SIOUX FALLS, SD	CMRC	79261	68003	NR	96.3	49	95.8	NR
88	SPARTAN EXPRESS, INC., GREER, SC	CMGF	78595	69582	NR	104.3	97	110.9	NR
89	DSI TRANSPORTS, INC., HOUSTON, TX	CMLP	76486	72331	94	91.6	19	91.5	21
90	NATIONAL CARRIERS, INC., LIBERAL, KS	CMRC	76248	73020	92	95.8	44 T	95.9	48
91	MILLER TRANSPORTERS, INC., JACKSON, MS	CMLP	75929	70301	97	99.0	80 T	101.5	89
92	CASSENS TRANSPORT COMPANY, EDWARDSVILLE, IL	CMMV	74969	77310	88	102.2	95	102.3	91
93	JACK GRAY TRANSPORT, INC., GARY, IN	CMSC	74530	77789	87	97.0	57	92.5	24
94	DALLAS & MAVIS FORWARDING CO., KENOSHA, WI	CMMV	74243	82846	80	96.9	56	95.1	40
95	NU-CAR CARRIERS, INC., BIRMINGHAM, MI	CTMV	73896	133146	46	108.0	98	103.2	94
96	MALONE FREIGHT LINES, INC., BIRMINGHAM, AL	CMGF	70986	63670	NR	99.5	86	98.7	NR
97	PAULS TRUCKING CORPORATION, AVENEL, NJ	CMSC	67573	64327	NR	99.2	84 T	100.6	NR
98	FORE WAY EXPRESS, INC., WAUSAU, WI	CMGF	67469	60774	NR	99.2	84 T	98.1	NR
99	MORGAN DRIVE AWAY, INC., ELKHART, IN	CMSC	65950	62484	NR	97.6	65	97.5	NR
100	JONES MOTOR COMPANY, INC., SPRING CITY, PA	CMGF	64890	62154	NR	101.6	93	99.3	NR

	Gross Revenue	Expenses	Post Tax Net Income
TOTAL TOP 100-1990	$34,748,368	$33,235,682	$790,676*
TOTAL TOP 100-1989	$32,356,211	$30,983,015	$730,865
TOTAL TOP 100-1988	$30,540,353	$29,041,440	$937,809

Total doesn't reflect Net Income of Burlington Motor Carriers, which did not supply final earnings.

THE SECOND 100

(all dollar amounts in thousands)

1990 Revenue Rank	Fleet Name, City, State	Carrier Type	1990 Gross Revenues	1989 Gross Revenues	Operating Ratio 1990	Operating Ratio 1989
101	PACIFIC MOTOR TRUCKING COMPANY, OKLAHOMA CITY, OK	CTMV	$64370	$54087	93.8	106.9
102	McGIL SPECIALIZED CARRIERS, INC., MARIETTA, GA	CMSC	64023	60799	100.7	98.2
103	WILLIS SHAW FROZEN EXPRESS, INC., ELM SPRINGS, AR	CMRC	63830	57088	90.5	89.6
104	HEARTLAND EXPRESS INC. OF IOWA, CORALVILLE, IA	CMGF	62810	48300	97.4	97.5
105	ACME TRUCK LINE, INC., HARVEY, LA	CMGF	61436	45292	97.3	97.4
106	CROUSE CARTAGE COMPANY, CARROLL, IA	CMGF	61168	55125	95.3	95.3
107	TNT BESTWAY TRANSPORTATION, INC., PHOENIX, AZ	CMGF	60404	54251	94.2	90.0
108	ROEHL TRANSPORT, INC., MARSHFIELD, WI	CMGF	60051	50986	88.9	88.3
109	JONES TRANSFER COMPANY, MONROE, MI	CMGF	60035	65748	99.6	97.3
110	MAY TRUCKING COMPANY, PAYETTE, ID	CMGF	60002	60774	99.3	100.1
111	WILSON TRUCKING CORP., FISHERVILLE, VA	CMGF	59632	57656	92.8	92.8
112	SOUTHWEST MOTOR FREIGHT, INC., CHATTANOOGA, TN	CMGF	58977	49043	99.9	101.1
113	ALTERMAN TRANSPORT LINES, INC., OPA LOCKA, FL	CMRC	58618	54274	100.0	99.2
114	STANDARD TRUCKING COMPANY, CHARLOTTE, NC	CMGF	58472	47208	97.5	98.1
115	GEMINI TRANSPORTATION SERVICES, JACKSONVILLE, FL	CMGF	58416	90163	101.7	97.1
116	SOUTHWESTERN MOTOR TRANSPORT, SAN ANTONIO, TX	CMGF	57871	56972	97.6	97.6
117	P.A.M. TRANSPORTATION SERVICES, TONTITOWN, AR	CMGF	57545	70122	105.3	107.4
118	CENTRAL TRANSPORT, INC., HIGH POINT, NC	CMLP	57528	51089	95.8	93.6
119	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	57518	53131	97.1	94.6
120	JACK B. KELLEY, INC., AMARILLO, TX	CMSC	57380	54275	99.4	100.3
121	NEW ENGLAND MOTOR FREIGHT, INC., ELIZABETH, NJ	CMGF	56891	49758	96.7	96.4
122	GLOBAL VAN LINES, INC., ORANGE, CA	CMHG	56865	60755	98.2	98.1
123	WARREN TRANSPORT, INC., WATERLOO, IA	CMGF	56049	54637	93.1	92.9
124	JANESVILLE AUTO TRANSPORT, BLOOMFIELD HILLS, MI	CTMV	54544	57664	91.6	95.6
125	U.S. XPRESS, INC., CHATTANOOGA, TN	CMGF	54421	38074	91.2	89.7
126	CONTRACT TRANSPORTATION SYSTEMS CO., CLEVELAND, OH	CMGF	54206	45620	91.7	88.7
127	AMERICAN PRESIDENT DOMESTIC CO., LTD., OAKLAND, CA	CMGF	53059	44323	112.0	125.3
128	BE-MAC TRANSPORT CO., INC., ST. LOUIS, MO	CMGF	52914	51224	100.0	99.1
129	DEATON, INC., BIRMINGHAM, AL	CMSC	52511	54369	99.5	102.2
130	SMALLEY TRANSPORTATION COMPANY, TAMPA, FL	CMGF	51972	49739	100.6	101.7
131	ARMELLINI EXPRESS LINES, INC., PALM CITY, FL	CMSC	51060	47725	98.4	96.7
132	TNT REDDAWAY TRUCK LINE, INC., CLACKAMAS, OR	CMGF	50976	35771	88.1	84.9
133	WILEY SANDERS TRUCK LINES, INC., TROY, AL	CMGF	50970	53720	83.2	83.0
134	TLC LINES, INC., ST. CLAIR, MO	CMGF	50653	51615	98.5	96.7
135	COMMERCIAL CARRIER CORP., AUBURNDALE, FL	CMGF	50297	51512	89.2	85.2
136	CON-WAY EASTERN EXPRESS, INC., PORTLAND, OR	CMGF	50193	67734	139.7	110.2
137	GLENN McCLENDON TRUCKING CO., INC., LAFAYETTE, AL	CMGF	50056	45171	91.8	93.3
138	TMC TRANSPORTATION, INC., DES MOINES, IA	CMGF	49732	42247	94.0	98.0
139	SHAFFER TRUCKING, INC., NEW KINGSTOWN, PA	CMRC	49550	42877	92.2	95.9
140	ARROW TRUCKING COMPANY, TULSA, OK	CMGF	49073	36551	93.4	96.0
141	MOTOR CARGO, NORTH SALT LAKE, UT	CMGF	49068	43494	91.9	91.2
142	INDUSTRIAL FREIGHT SYSTEM, INC., SUN VALLEY, CA	CMGF	49025	42435	98.6	97.9
143	ECK MILLER TRANSPORTATION CORP., ROCKPORT, IN	CMGF	48988	57713	96.7	106.6
144	McKENSIE TANK LINES, INC., TALLAHASSEE, FL	CMLP	48908	51861	98.8	94.1
145	DAILY EXPRESS, INC., CARLISLE, PA	CMSC	47632	48073	97.0	95.6
146	SMITHWAY MOTOR XPRESS, INC., FORT DODGE, IA	CMGF	47486	41078	96.3	97.6
147	RYDER TEMP CONTROLLED CARRIAGE, NASHVILLE, TN	CMRC	46931	44383	108.5	114.4
148	WHEATON VAN LINES, INC., INDIANAPOLIS, IN	CMHG	46810	46208	98.9	97.0
149	LYNDEN TRANSPORT, INC., KENT, WA	CMGF	46691	48371	92.3	91.1
150	BULKMATIC TRANSPORT COMPANY, CHICAGO, IL	CMSC	46104	43350	94.5	95.4

Certain corporations were excluded from CCJ's TOP 100 list because they only provided limited data on consolidated operations, rather than individual operating entities in the corporate family. Among them was Schneider International (1990 revenues: $182.7 million). Schneider serves three markets—van, bulk and specialized/flatbed. Its three business units each has a dedicated group and systems operation. Only Schneider National Bulk Carriers (1990 revenues: $45.3 million, ranked #154) is included in the Top 200 listing.

CRST International consists of 5 motor carriers: CRST Inc., Malone Freight Lines Inc., Three I Truck Line Inc., Lilley Trucking Inc., J Transportation Inc. Only Malone is covered in this report (1990 revenues: $71.0 million, ranked #96).

Annual reports for several Top 100 candidates were not received in time to be included in the TOP 100 listings. They include: Estes Express Lines, Richmond, Va., whose 1990 revenues were $96.9 million; Roberts Express, Akron, Oh., $92.4 million; Mercer Transportation, Louisville, Ky., $88.3 million; and PST Inc., Lindon, Ut., $64.5 million.

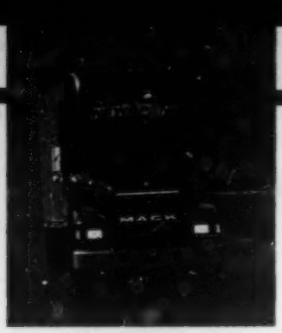
No data were available for the following Top 100 candidates: Roadway Package System, Pittsburgh, Pa.; Pennsylvania

1990 Revenue Rank	Fleet Name, City, State	Carrier Type	1990 Gross Revenues	1989 Gross Revenues	Operating Ratio	
					1990	1989
151	GREAT COASTAL EXPRESS, INC., CHESTER, VA	CMGF	$45507	$39926	89.9	90.6
152	KENAN TRANSPORT COMPANY, CHAPEL HILL, NC	CMLP	45397	43363	96.9	92.1
153	SAVAGE INDUSTRIES, INC., SALT LAKE CITY, UT	CMBC	45331	37905	93.8	98.1
154	SCHNEIDER NATIONAL BULK CARRIERS, GREEN BAY, WI	CMLP	45322	27286	92.0	98.7
155	MIDDLEWEST FREIGHTWAYS, INC., ST. LOUIS, MO	CMGF	45048	41761	99.0	100.7
156	WARD TRUCKING CORP., ALTOONA, PA	CMGF	44333	40675	103.9	104.7
157	FREDRICKSON MOTOR EXPRESS CORP., CHARLOTTE, NC	CMGF	44155	42749	99.5	98.6
158	COUNTRY WIDE TRUCK SERVICE, INC., FONTANA, CA	CMGF	43912	71077	121.3	112.9
159	TRANSPORT SERVICE CO., HINSDALE, IL	CMLP	43589	34870	88.1	91.1
160	D.M. BOWMAN, INC., WILLIAMSPORT, MD	CMSC	43378	44841	97.1	96.2
161	B.I. TRANSPORTATION, INC., BURLINGTON, NC	CTGF	43078	62860	104.9	94.9
162	THE MASON & DIXON LINES, INC., WARREN, MI	CMGF	42678	37472	97.0	100.5
163	THE O.K. TRUCKING COMPANY, CINCINNATI, OH	CMGF	42504	42532	99.8	98.9
164	CANADIAN PACIFIC TRANSPORT (US), INC., CUDAHY, WI	CTGF	42325	NR	107.6	NR
165	KENOSHA AUTO TRANSPORT CORP., KENOSHA, WI	CMMV	42077	54157	98.8	99.4
166	GREAT AMERICAN LINES, INC., MURRYSVILLE, PA	CMGF	41889	42808	97.9	101.6
167	PLOOF TRUCK LINES, INC., JACKSONVILLE, FL	CMGF	41489	40409	86.7	84.1
168	GEORGE TRANSFER, INC., PARKTON, MD	CMGF	41340	38882	97.5	98.2
169	THE MANFREDI MOTOR TRANSIT CO., NEWBURY, OH	CMSC	41076	38858	93.3	96.7
170	NEW WORLD VAN LINES, INC., CHICAGO, IL	CMHG	40925	36615	94.8	95.5
171	TRANSCONTINENTAL REFRIGERATED LINES, PITTSTON, PA	CMRP	40797	27749	99.5	94.9
172	SCHWERMAN TRUCKING CO., MILWAUKEE, WI	CMSC	39365	38391	97.8	96.9
173	HAROLD IVES TRUCKING CO., STUTTGART, AR	CMGF	39158	37235	96.8	98.7
174	UMTHUN TRUCKING COMPANY, EAGLE GROVE, IA	CTGF	39135	36532	99.5	95.5
175	LIQUID TRANSPORTERS, INC., LOUISVILLE, KY	CMLP	39068	NA	94.9	NA
176	MELTON TRUCK LINES, INC., SHREVEPORT, LA	CMSC	38806	41640	98.6	101.9
177	A.J. METLER HAULING & RIGGING, INC., KNOXVILLE, TN	CMSC	38693	35883	98.5	98.5
178	PACIFIC MOTOR TRANSPORT, LAFAYETTE, CA	CMGF	38312	37355	94.0	93.6
179	HOLMES FREIGHT LINES, INC., OMAHA, NE	CMGF	38211	36633	95.9	93.3
180	ENTERPRISE TRANSPORTATION CO., HOUSTON, TX	CMLP	38142	35324	94.1	98.8
181	COLONIAL FREIGHT SYSTEMS, INC., KNOXVILLE, TN	CMRC	38115	42566	97.5	98.3
182	MILAN EXPRESS CO., INC., MILAN, TN	CMGF	38014	35277	97.3	96.3
183	VICTORY EXPRESS, INC., MEDWAY, OH	CMGF	37069	30533	89.7	91.5
184	CRESCENT TRUCK LINES, INC., UNION CITY, CA	CMGF	36800	33304	94.5	93.1
185	PITT-OHIO EXPRESS, INC., PITTSBURGH, PA	CMGF	36384	28055	85.4	88.7
186	FLORIDA ROCK & TANK LINES, INC., JACKSONVILLE, FL	CMLP	36301	29061	95.8	95.7
187	J.H. WARE TRUCKING, INC., FULTON, MO	CMGF	35768	NA	93.2	NA
188	MOUNTAINSIDE TRANSPORT, INC., CLEVELAND, OH	CTGF	35218	34166	99.4	98.8
189	OLEN BURRAGE TRUCKING CO., PHILADELPHIA, MS	CMGF	35208	39097	98.1	96.5
190	RUAN TRANSPORT CORP., DES MOINES, IA	CMBC	35191	24686	99.6	105.9
191	LENERTZ, INC., SOUTH ST. PAUL, MN	CMGF	34984	35902	100.8	101.6
192	B&W CARTAGE CO., INC., OAK LAWN, IL	CMGF	34873	37351	100.5	98.1
193	BOYD BROTHERS TRANSPORTATION CO., CLAYTON, AL	CMGF	34730	30811	90.2	93.3
194	SAMMONS TRUCKING, MISSOULA, MT	CMBM	34717	34439	99.9	98.4
195	BEELMAN TRUCK CO., ST. LIBORY, IL	CMSC	34199	30766	94.9	94.7
196	DART TRUCKING COMPANY, INC., CANFIELD, OH	CMBC	34014	28039	94.7	97.3
197	SUPERIOR CARRIERS, INC., OAK BROOK, IL	CTBC	33538	28940	92.3	93.7
198	GRA-BELL TRUCK LINE, INC., HOLLAND, MI	CMGF	33180	28764	99.6	102.1
199	RED ARROW FREIGHT LINES, INC., CHERRYVILLE, NC	CMGF	32968	25330	100.2	104.4
200	BLUE RIDGE TRANSFER CO., INC., ROANOKE, VA	CMGF	32582	33843	108.7	102.5

Truck Lines, Wynnewood, Pa.; Fleet Transport Co., Cleveland, Oh.; Refiners Transport & Terminal Corp., Cleveland, Oh.; RTC Transportation, Forest Park, Ga.; and Donco Carriers, Inc., Oklahoma City, Okla.

Second 100 candidates whose annual report information was not filed on time were: Paul Arpin Van Lines, East Greenwich, R.I., $55.5 million revenue; Gordon Trucking Inc., Sumner, Wash., $52.9 million; Key Way Transport, Baltimore, Md. $46.0 million; and Di Salvo Trucking Co., San Francisco, Calif., $40.9 million. Second 100 candidates that didn't file 1990 data include: Monfort Transportation Co., Greeley, Colo.; PBX Inc., Dakota City, Neb.; Keystone Lines, Anaheim, Calif.; Gross Common Carrier, Wisconsin Rapids, Wisc.; Scheduled Truckways, Rogers, Ark.; and Schanno Transportation, West St. Paul, Minn.

Previous top carriers which have closed down include PIE Nationwide, Jacksonville, Fla. (and Transcon Lines); Brown Transport Corp., Charlotte, N.C.; Whiteford Transport Systems, South Bend, Ind.; Lyons Transportation, Erie, Pa.; Pioneer Transportation Systems, Hurlock, Md.; and Midwestern Distribution, Fort Smith, Kan.



Industry projections mixed for balance of 1991

Most TOP 100 carriers overcame the recessionary challenges of 1990, but the trucking industry's leaders aren't wildly optimistic about the balance of 1991.

Here are some of mixed views elicited from carrier executives and financial analysts in an informal CCJ survey:

• Russel Burleson, vice president-finance, Southeastern Freight Lines, Columbia, S.C., is "more optimistic" about the balance of the year than some other fleet managers because Southeastern "came back strong" in April and had a "real good" May.

As a result, he expects his company's 1991 pre-tax net income to be 10% to 20% better than 1990.

• But Larry Dennis, vice president-finance, Cresco Lines, Harvey, Ill., says business will be "a little slower" than it was in the Spring because "the economy has not hit bottom yet." Dennis said that about 30% of Cresco's freight is building materials for the residential market.

• George H. Beeson, vice president of finance and treasurer, Melton Truck Lines, Shreveport, La., expects the balance of 1991 to "be better" because business started to pick up in the Spring. And "if the recession hasn't ended now [June], it will in 30 to 45 days."

• Since business didn't pick up in the Spring, "the outlook is not good," for the balance of 1991, says Frederic J. Astle, vice president of finance and treasurer, A-P-A Transport, North Bergen, N.J.

• Walter Burch, vice president and controller, Watkins Motor Lines, Lakeland, Fla., said there's been "small revenue growth in 1991. We're maintaining 1990 profit levels."

• Jacob Wood, executive vice president of Werner Enterprises, Omaha, Neb., said 1991 will be "very difficult for the truckload environment."

In early 1991, business upticks have been "running in spurts so far, but there's no consistency."

• Burl G. Cott, senior vice president finance, FFE Transportation Services, Dallas, said FFE has not experienced a downturn because temperature-control fleets haul food and medicine which aren't impacted to the same degree as general commodities. In fact, Cott expects FFE to have slower but continued growth in 1991. In recent years FFE had 30% revenue growth.

• Douglas Rockel, Senior Industry Analyst, Merrill Lynch Capital Markets, New York City, isn't optimistic in the near term for the LTL sector because freight volume is "weak" and rates have "deteriorated." Perhaps rates will increase in fourth quarter, says Rockel. The TL market looks a little better for the balance of the year, but driver turnover problems have "resurfaced," he noted.

• Richard Wimmer, partner, Ernst & Young, Winston-Salem, N.C., said there will be a "slight upward tick" in freight levels for the balance of 1991. Wimmer also noted that specialized niche carriers such as furniture and textile haulers in North Carolina "are making a ton of money," but not the general freight fleets.

• Kirby Lane, vice president, KLLM Transport Services, Jackson, Miss., said that despite "continued improvement" in 1991, there is a "general softness." Lane doesn't expect the recession to end before the end of the year.

Profit comparison by type fleet average

	1990 OR	1989 OR	1990 Profit Margin	1989 Profit Margin
Less-than-truckload	95.3	95.5	2.74%	2.67%
Truckload	94.8	95.2	2.04%	1.64%
Tank Truck	94.5	95.7	2.25%	0.42%
Car Carriers	100.3	98.7	-1.47%	-0.12%
Reefers	95.3	96.3	1.76%	0.89%
Household Goods	99.2	98.3	0.30%	0.82%

Last year, revenues were up 61% to $198.9 million while expenses increased 49%. The OR shrank eight points to 98.2, and a $220,000 net profit was earned.

According to John Larkin, analyst for Alex. Brown & Sons, the Baltimore brokerage, strategies that helped turn MNX around last year included:

- reducing length of haul to minimize competition with rail-intermodal service;
- increasing contract carriage operations;
- good utilization of 53-ft and 57-ft trailers;
- capitalizing on freight made available by the carrier's Mark VII intermodal brokerage.

Where TOP 100 data came from

Transportation Technical Services (TTS), Fredericksburg, Va., compiled the TOP 100 data exclusively for CCJ, based on information filed with the Interstate Commerce Commission by Class I and II carriers.

TTS is a wholly-owned affiliate of the Central Analysis Bureau of New York City. □

The TOP 100 and Trends & Statistics are available in a booklet for $8. For a copy, or copies, of the booklet, write on company letterhead to: Reprint Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089. Send prepaid check or money order.

Economic factors that affect trucking industry

Noted below is a comparison of some factors of the U.S. economy that impacted the trucking industry in 1989 and 1990:

	1989	1990
Gross National Product	$5,201 billion	$5,464 billion
Consumer expenditures	$3,450 billion	$3,659 billion
Exports	$626 billion	$671 billion
Imports	$672 billion	$705 billion
Hourly compensation (non-farm)	+3.2%	+3.5%
Industrial production (1987=100)	108.7	109.2
Industrial capacity used	83.9%	82.3%
Housing units started	1.3 million	1.2 million
Auto sales	9.9 million	9.5 million
Crude oil cost per bbl. to U.S. refiners	$17.95 billion	$22.36 billion
Unemployment rate	5.3%	5.5%
Federal budget deficit	$134.3 billion	$164.5 billion
Prime interest rate	10.9%	10.0%
Personal income	$4,384 billion	$4,645 billion
Pre-tax corporate profits	$307.7 billion	$306.2 billion
Post-tax corporate profits	$172.6 billion	$171.9 billion

CARRIERS WITH FOR-HIRE AUTHORITY

Year	Class I (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL*
1990	870	1,169	42,109	44,414
1989	886	1,189	37,247	39,602
1988	889	1,179	37,182	39,609
1987	856	1,266	35,505	38,338
1986	947	1,387	33,903	36,948
1985	1,013	1,489	30,337	33,283
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722
1981	1,031	2,293	18,563	22,270

Left: This data reflects post deregulation restructuring of Class 1, 2 and 3 for-hire carriers and private carriers with for-hire authority (Class 1 = revenues of $5 million or more; Class 2 = between $1 million and $5 million; Class 3 = $1 million or less). The number of Class 3 carriers appears to have risen 127% from 1981 levels, but a certain amount of the increase in Class 3 is merely on paper, not in vehicles operating out on the highway. Thus Class 3 numbers can be misleading. The same is true but less obvious for Classes 1 and 2, which appear to have decreased in number.

* The carrier totals for 1990 reflect 266 Class 1 and 2 carriers operating, but exempted from filing with the Interstate Commerce Commission. The number of exempted Class 1 and 2 carriers in previous years totaled: 280 in 1989, 359 in 1988, 711 in both 1987 and 1986, 444 in 1985, 469 in 1984, 336 in 1983, 380 in 1982, 383 in 1981. *Source: Transportation Technology Services.*

GOOD NEWS, BAD NEWS

By **JERRY STANDLEY,** *Editor-in-Chief, and* **MATTHEW R. HOGAN,** *Market Research Editor*

There was plenty of bad news last year for truck sellers, and 1991 will be worse. The good news is the market is set for a glorious comeback.

The last time truck, trailer and equipment manufacturers suffered as much as now was during the 1982 recession. Hopefully, the recession of 1990-91 is on the uptick as you read this. That's what economists and trucking experts were saying would happen at press time for this issue. They also said that fundamental factors affecting demand for trucks, trailers and equipment are positive for the next several years.

Economic conditions that choked tonnage and equipment sales for the past nine months have affected virtually every segment of the motor carrier industry. The Persian Gulf crisis, which continued well into the first quarter of this year, only made things worse.

Major truck builders' earnings are suffering through steep sales declines so far this year. One example is Navistar International Transportation Corp., maker of International brand trucks. The company reported a $29 million loss for its second fiscal quarter (ending April 30, 1991) compared to $8 million in profit for the same period in 1990. Sales for every Class 8 truck builder are off this year compared to 1990.

On the upbeat, industry soothsayers insist 1992 will be a comeback year. One of those is Ken Kremar, director-capital goods and freight transportation, Economic Consulting and Planning Inc. of New York (ECAP):

According to Kremar: "1992 stacks up as a banner year for trucks and trailers. All the economic fundamentals will be tilted favorably, triggering not only more aggressive replacement buying, but fleet expansion, too.

"Look for a 6% increase in the goods economy for 1992 [Goods Economy = Real Gross National Product minus "Services"]. New home starts also should surge 25% to 1.42 million units. Industrial output will increase 5.2%.

"As the economic recovery gathers momentum and [carrier] profit margins increase," Kremar says, "demand for equipment should improve as well."

Classes 3 to 7

After declining 5% last year to 177,000 units, retail sales of GVW Classes 3 to 7 trucks will fall farther this year to 170,000 units or less.

Weak retail demand here and in Canada, and dealer and producer efforts to reduce inventories will keep North American factory sales of Classes 4 to 7 trucks and buses at approximately 140,000 units versus 150,000 last year.

As economic and market fundamentals turn very positive, retail sales of Classes 4 to 7 could bounce back as high as 190,000 units in 1992. A strong comeback in the U.S. market, positive economic signals in Canada and efforts to replenish inventories will push North American factory sales to 165,000-170,000 units.

Class 8

ECAP says Class 8 retail sales will fall off 9% this year to 111,000 units. Sales next year could increase 19% to 132,000 units.

But there are less optimistic forecasts. Eaton Corp. sees factory sales of GVW Class 8 finishing at 103,000 units this year, increasing to only 125,000 for 1992.

The Heavy Duty Truck Committee of the Automotive Market Research Council (AMRC) presented last March its forecast of the U.S. truck retail sales. AMRC expects 103,700 Class 8 sales this year, and:

1992. 131,400
1993. 147,800
1994. 121,900
1995. 136,200
1996. 146,300

Continued

AMRC's retail sales outlook for Classes 4 to 7:

1991. 142,900
1991. 166,600
1993. 185,000
1994. 168,900
1995. 181,700
1996. 189,300

AMRC looks for import share in Classes 4 to 7 to hold flat between 11.6 and 11.9% through 1996. The AMRC expects a 40% increase in Class 8 sales over the next two years, with U.S. and Canadian sales totaling 164,000 in 1993. That's the year most analysts are convinced there will be a strong pre-buying spree by motor carriers looking to avoid more costly 1994 diesel engines. More costly engines are the result of 1994 diesel engine emission restrictions mandated by the U.S. Environmental Protection Agency.

According to one Eaton official, that factor alone could account for up to 20,000 Class 8 unit sales in 1993.

But, in 1990...

International retained its heavy truck sales lead in 1990 with 28.6% of the Class 6, 7 and 8 retail sales. The company also extended its lead in Class 8 sales. International's 1990 sales were 27,800 units. That's down 19.8% from 1989, but still in front of the pack with 23% of the market.

Freightliner is the number two Class 8 producer, and closing. This U.S. subsidiary of Mercedes–Benz sold 23,032 units for 19% of the market, down 1.5% from 1989.

Sales were down last year for every builder of Class 8 trucks in America. The worst loss in Class 8 sales was Peterbilt, down 27.7% (4,587 units) from 1989. Sales at Kenworth, Peterbilt's sister company, slumped 17.9% (3,186 units) for the same period. Combined 1990 retail sales for Paccar totaled 27,338 units. That's down 22.4% from 1989. Paccar is the parent of Kenworth and Peterbilt, and mar-

Text continues on page 84

Navistar International Transportation Corp., maker of International trucks, is using this [illegible] to help promote awareness of its lead in U.S. medium and heavy truck sales. Sales vice president Wayne Krzysiak says 1990 is the 10th consecutive year International has held the number one spot for combined Class 5, 6, 7 and 8 retail sales.

Below: This chart tracks the previous six years of Class 1-8 domestic factory sales of trucks. Class 8 truck sales, the industry bellwether, showed the biggest decline in 1990. Sales dropped 16.3% (20,855 units) vs. 1989. The decline in Class 8 sales is three times greater than corresponding drop offs in Classes 3 - 7 combined. 1990 was the third straight year of decline for Class 7 sales, which have steadily fallen 20% (17,351 units) since 1987. Group sales of Class 6,7,8 trucks combined fell 11.7% last year (25,244) units. That same group's sales dropped three years in a row, off 21.9% (53,301 units) from 1988 levels.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1990	1989	1988	1987	1986	1985
Class 1 (6000 lb and less)						
Total Sales	2,377,468	2,447,962	2,496,648	2,270,566	1,964,832	1,854,901
Diesel Sales	337	107	86	1,813	4,999	9,663
% Diesel	–	–	–	0.1%	0.3%	0.5%
Class 2 (6001-10,000 lb)						
Total Sales	848,690	1,057,067	1,020,515	976,803	927,462	989,633
Diesel Sales	94,030	88,636	79,535	85,125	96,443	123,882
% Diesel	11.1%	8.4%	7.8%	8.7%	10.4%	12.5%
Class 3-4 (10,001-16,000 lb)						
Total Sales	693	54	86	476	–	19,397
Diesel Sales	55	54	86	322	–	5,870
% Diesel	7.9%	100%	100.0%	67.6%	–	30.3%
Class 5 (16,001-19,500 lb)						
Total Sales	1,644	4,197	5,224	5,841	5,749	5,123
Diesel Sales	51	3,559	1,599	431	–	–
% Diesel	3.1%–	84.8%	30.6%	7.4%	–	–
Class 6 (19,501-26,000 lb)						
Total Sales	16,288	16,327	29,332	17,092	17,846	25,810
Diesel Sales	11,458	10,475	17,429	9,184	9,265	14,253
% Diesel	70.3%	64.2%	59.4%	53.7%	51.9%	55.2%
Class 7 (26,001-33,000 lb)						
Total Sales	66,990	71,340	79,143	84,341	77,597	81,122
Diesel Sales	53,957	55,568	56,574	56,719	47,694	50,492
% Diesel	80.5%	77.9%	71.5%	67.2%	61.5%	62.2%
Class 8 (33,001 lb & Over)						
Total Sales	107,025	127,880	135,129	121,425	103,216	120,941
Diesel Sales	107,002	127,826	134,981	121,192	102,671	120,311
% Diesel	99.99%	99.9%	99.9%	99.8%	99.5%	99.5%

TRUCK FACTORY SALES (U.S. domestic only; excluding tactical military vehicles)

GVW	Class 1 Up to 6,000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
Sales Year	1989	1990	1989	1990	1989	1990	1989	1990	1989	1990	1989	1990
Chevrolet	845,085	791,202	306,861	217,276	–	–	–	464	84	51	2,063	2,014
GMC	208,058	191,587	97,904	77,095	–	–	–	174	4,113	1,593	2,287	2,036
Oldsmobile	4,270	29,319	–	–	–	–	–	–	–	–	–	–
Pontiac	6,765	33,332	–	–	–	–	–	–	–	–	–	–
Chrysler	309,482	268,862	51,753	55,414	–	–	–	–	–	–	–	–
Ford	758,431	758,270	590,647	492,685	–	–	–	–	–	–	4,566	4,817
Freightliner	–	–	–	–	–	–	–	–	–	–	–	–
International	–	–	–	–	–	–	54	55	–	–	6,682	6,922
Jeep	192,814	131,003	9,902	6,220	–	–	–	–	–	–	–	–
Kenworth	–	–	–	–	–	–	–	–	–	–	–	–
Mack	–	–	–	–	–	–	–	–	–	–	–	–
Mercedes-Benz	–	–	–	–	–	–	–	–	–	–	749	499
Peterbilt	–	–	–	–	–	–	–	–	–	–	–	–
Volvo GM	–	–	–	–	–	–	–	–	–	–	–	–
Others	123,057	173,893	–	–	–	–	–	–	–	–	–	–
TOTAL	2,447,962	2,377,468	1,057,067	848,690	–	–	54	693	4,197	1,644	16,327	16,289

TRUCK RETAIL SALES (Data includes imports; CKD units assembled in the U.S.)

GVW	Class 1 Up to 6,000 lb		Class 2 6,001 - 10,000 lb		Class 3 10,001 - 14,000 lb		Class 4 14,001 - 16,000 lb		Class 5 16,001 - 19,500 lb		Class 6 19,501 - 26,000 lb	
Sales Year	1989	1990	1989	1990	1989	1990	1989	1990	1989	1990	1989	1990
Chrysler	1,812	2,891	–	–	–	–	–	–	–	–	–	–
Dodge	417,319	349,079	124,064	109,018	7,046	7,856	–	–	–	–	–	–
Plymouth	184,943	171,527	–	–	–	–	–	–	–	–	–	–
Jeep	238,455	190,699	10,715	6,164	–	–	–	–	–	–	–	–
Total Chrysler	842,529	714,196	134,779	115,182	7,046	7,856	–	–	–	–	–	–
Ford	716,141	778,064	660,205	569,372	–	–	25,848	26,057	–	–	9,526	6,444
Freightliner	–	–	–	–	–	–	–	–	–	–	–	–
Chevrolet	928,050	933,192	381,089	309,032	698	678	–	103	234	247	7,424	8,944
GMC	231,079	221,675	121,318	103,390	1,391	1,280	–	25	4,456	1,992	5,371	5,817
Oldsmobile	2,122	26,075	–	–	–	–	–	–	–	–	–	–
Pontiac	3,226	29,875	–	–	–	–	–	–	–	–	–	–
Total GM	1,164,477	1,210,817	562,407	103,390	2,089	1,958	–	128	4,692	2,239	12,795	14,761
Hino	–	–	–	–	262	309	–	–	465	516	503	660
International	–	–	–	–	–	–	226	58	152	115	11,795	11,943
Isuzu	–	–	–	–	6,066	6,624	653	685	230	375	743	1,824
Iveco	–	–	–	–	1,422	1,613	504	525	256	240	175	160
Kenworth	–	–	–	–	–	–	–	–	–	–	–	–
Mack	–	–	–	–	–	–	–	–	–	–	1,819	1,051
Mazda	–	3,409	–	–	–	–	–	–	–	–	–	–
Mercedes-Benz	–	–	–	–	–	–	–	–	–	–	796	535
Mitsubishi Fuso	–	–	–	–	1,694	1,852	–	–	686	649	317	263
Nissan	130,978	134,260	–	–	–	–	–	–	–	–	–	–
Nissan Diesel	–	–	–	–	582	661	–	–	762	921	435	534
Peterbilt	–	–	–	–	–	–	–	–	–	–	–	–
Scania	–	–	–	–	–	–	–	–	–	–	–	–
Suzuki	369	3,365	–	–	–	–	–	–	–	–	–	–
Volvo GM Heavy	–	–	–	–	–	–	–	–	–	–	–	–
Western Star	–	–	–	–	–	–	–	–	–	–	–	–
Other Domestic	–	–	–	–	–	–	–	–	–	–	224	34
TOTAL	2,954,494	2,865,737	1,297,391	1,096,976	19,161	20,873	27,931	27,453	7,243	5,955	39,128	38,209

Source: MVMA. **Top:** These data are 1989 and '90 factory sales from U.S. plants only and do not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. MVMA reporting firms do not represent entire industry. Volvo GM does not report separate factory sales figures for Class 8 Volvo, WhiteGMC and Autocar trucks (combined as 17,030 units above). "Others" include Nissan, Marmon and Oshkosh. **Bottom:** The most accurate picture of truck sales in America is in the Retail sales chart (See "Factory vs. Retail sales" on next page).

[1] – 1989 Minivans classified as trucks.

TRUCK FACTORY SALES Continued

Class 7 26,001 - 33,000 lb		Class 8 33,001 lb +		Grand Total		GVW
1990	1989	1990	1989	1990	1989	Sales Year
7,721	7,007	–		1,161,814	1,018,014	Chevrolet
11,817	13,677	96	12	324,257	286,174	GMC
–	–	–	–	4,270	29,319	Oldsmobile
–	–	–	–	6,766	33,332	Pontiac
–	–	–	–	361,235	88,746	Chrysler
28,699	24,518	12,963	12,358	1,395,306	1,292,446	Ford
–	–	22,914	21,626	22,914	21,626	Freightliner
21,922	20,995	24,269	19,786	52,927	47,738	International
–	–	–	–	202,716	137,223	Jeep
–	–	15,433	12,825	15,433	12,825	Kenworth
–	–	16,642	13,665	16,642	13,665	Mack
1,181	995	–	–	1,930	1,494	Mercedes-Benz
–	–	17,776	11,903	17,776	11,903	Peterbilt
–	–	17,030	14,247	17,030	14,247	Volvo GM
–	–	755	623	123,812	174,516	Others
71,340	66,990	127,888	107,025	3,724,827	3,413,755	TOTAL

TRUCK RETAIL SALES Continued

Class 7 26,001 - 33,000 lb		Class 8 33,001 lb +		Grand Total		GVW
1990	1989	1990	1989	1990	1989	Sales Year
0	0	0	0	1,812	2,891	Chrysler
0	0	0	0	548,429	465,953	Dodge
0	0	0	0	184,943	171,527	Plymouth
0	0	0	0	249,170	196,863	Jeep
0	0	0	0	984,354	837,234	Total Chrysler
32,531	26,465	13,995	13,103	1,458,046	1,419,505	Ford
0	0	23,381	23,032	23,381	23,032	Freightliner
8,272	7,278	0	0	1,325,767	1,259,474	Chevrolet
12,780	14,526	0	0	376,397	348,705	GMC
0	0	0	0	2,122	26,075	Oldsmobile
0	0	0	0	3,226	29,875	Pontiac
21,052	21,804	0	0	1,707,512	1,355,997	Total GM
911	943	0	0	2,141	2,428	Hino
31,341	30,422	34,671	27,800	78,185	70,338	International
669	572	0	0	8,361	10,080	Isuzu
0	0	0	0	2,357	2,538	Iveco
388	389	17,806	14,620	18,194	15,009	Kenworth
2,417	1,404	19,035	14,350	23,271	16,805	Mack
–	–	–	–	0	3,409	Mazda
1,241	1,105	0	0	2,037	1,840	Mercedes-Benz
611	559	0	0	3,308	3,323	Mitsubishi Fuso
0	0	0	0	130,978	134,260	Nissan
611	493	0	0	2,390	2,609	Nissan Diesel
546	359	16,557	11,970	17,103	12,329	Peterbilt
0	0	116	103	116	103	Scania
0	0	0	0	369	21,626	Suzuki
1,012	829	17,340	14,787	18,352	18,961	Volvo GM Heavy
0	0	1,419	935	1,419	935	Western Star
116	1	748	644	1,088	679	Other Domestic
83,448	85,345	145,068	121,324	4,482,962	4,260,972	TOTAL

Factory vs. retail sales

U.S. domestic factory sales figures, reported by members of the Motor Vehicle Manufacturers' Association, are the traditional source for year-to-year truck manufacturing analysis and comparisons. While not every truck builder is a member of the MVMA, all the big ones are. Factory sales figures provide a good perspective on domestic truck manufacturing activity.

But knowing just the number of trucks produced from truck manufacturing facilities on American soil does not reveal the whole truth about truck market sales activity in America.

For instance, factory sales data don't show 54,575 Class 6,7,8 vehicles, imported CKD or finished, for assembly and sale here by domestic and foreign manufacturers. Those vehicles were produced, in many cases by domestic truck producers, from factories on foreign soil, especially Canada.

In Class 8, for example, Navistar produced 7,509 International brand trucks for the U.S. market that don't show up on Factory sales figures. Freightliner, Paccar and other domestic producers also produced trucks in Canada for U.S. market consumption: Freightliner, almost 1,400 units; Paccar, nearly 1,800.

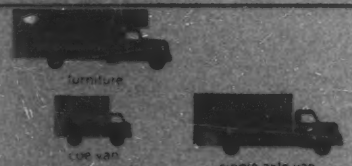
Those differences are manifest in the truck retail sales figures published by the MVMA.

Truck retail sales figures provide the best picture of truck sales in America. For instance, retail sales data show 20,873 Class 3 trucks were sold last year. Factory sales figures, by themselves, would indicate zero Class 3 sales for 1990.

In GVW Classes 1 - 8, retail sales data show an additional 842,174 vehicles sold last year than what is revealed in the factory sales figures. That's 19.8% of the market for 1990.

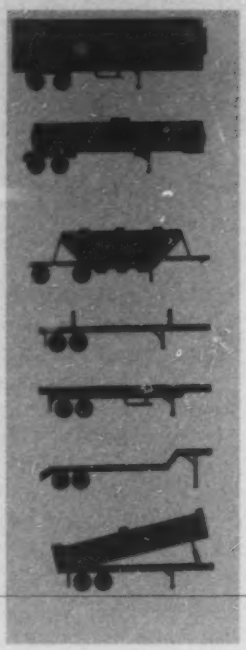
Finally, while retail sales figures provide a more accurate picture of truck market activity in the U.S., they are not the final word. For instance, retail sales data do not include U.S. sales for Toyota and certain other light trucks. Those missing vehicles account for many thousands of domestic small truck sales, mostly in GVW Class 1. A large number of those are for private use, however, not commercial business.

TRUCKS IN USE BY GVW (15-year factory sales from 1976 - 1990)

	CLASS 1 6,000 lb & Less	No. of Units 24,560,079	% of Total 53.49%
	CLASS 2 6,001-10,000 lb	No. of Units 17,272,289	% of Total 37.62%
	CLASS 3 10,001-14,000 lb	No. of Units 164,496	% of Total 0.36%
	CLASS 4 14,001-16,000 lb	No. of Units 12,179	% of Total 0.03%
	CLASS 5 16,001-19,500 lb	No. of Units 72,616	% of Total 0.16%
	CLASS 6 19,501-26,000 lb	No. of Units 912,381	% of Total 1.99%
	CLASS 7 26,001-33,000 lb	No. of Units 946,382	% of Total 2.06%
	CLASS 8 33,001 lb & Over	No. of Units 1,973,398	% of Total 4.30%
	TOTAL	45,913,570	100.00%

Totals include U.S. domestic and export factory sales of commercial vehicles, except tactical military and buses. Vehicle registration data compiled by R.L. Polk indicate the number of trucks in use is 56,022,934. The Polk data include imported vehicles, school buses and private fleet buses, but not municipal buses. The number of school buses is known to be understated, Polk says, because of varying registration procedures among the states. Polk estimates a 4.0% scrappage rate for 1990. *Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.*

TRAILERS IN USE (15-year new trailer shipments 1976 - 1990)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,173,819	48.9
Dry Freight/Open Top	57,177	2.4
Insulated/Semi-Insulated	317,648	13.2
Drop Frame	74,548	3.1
Livestock	22,419	0.9
Total Vans	1,645,611	68.5
SPECIAL TYPES		
Tanks/Liquid	88,743	3.7
Dry Bulk	26,079	1.1
Pole and Logging	22,869	1.0
Platform	290,897	12.1
Low-Bed	119,000	5.0
Dump	114,802	4.8
All Others	93,624	3.9
Total Special Types	756,014	31.5
TOTAL COMPLETE TRAILERS	2,401,625	100.0
Detachable Trailers[1]	63,294	
Detachable Chassis[2]	282,578	
Dollies and Converter Gear[3]	59,519	
GRAND TOTAL ALL TYPES	2,807,625	

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.
[1]—Mostly container units. [2]—Most used with containers. [3]—Separate axle and 5th-wheel assembly used to connect semi-trailers for double- and triple-trailer (LCV) combinations.

Above: The useful life of a trailer can be stretched beyond 15 years, depending on how one is used. This chart assumes a 15-year life because the majority of trailers older than that are in non-traditional uses, such as storage trailers.

Right: 1990 new trailer shipments declined 21.9% to 141,170 units from 1989 levels of 169,999.

Every category was down except open-top vans and pole/logging trailers. The 1,268 unit gain in those two categories does little to offset the 39,040 unit decline in the other categories. Van type trailers dropped 22.6% (29,440 units), while special types decreased 21.2% (10,868 units).

Market share in the three largest categories:

- dry freight/closed vans represent 49.4% of the market last year, vs. 55.3% in '89;
- reefers in 1990 were 15.6%, vs. 14.6% a year earlier;
- flatbeds (platform) dropped to 8.9% from 10.3% in 1989.

Note: The Department of Commerce continually revises trailer data used for this chart. These figures reflect revisions issued since July 1990.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1990p	1989r	1988r	1987r	1986r
VANS					
Dry Freight/Closed Top	69,710	94,027	96,390	99,054	91,571
Dry Freight/Open Top	4,246	3,217	3,254	2,776	2,948
Insulated/Semi-Insulated	22,001	24,887	24,862	26,650	20,228
Drop Frame	3,412	6,267	5,974	5,237	3,782
Livestock	1,354	1,765	1,511	1,663	2,118
Total Vans	100,723	130,163	131,991	135,380	120,647
SPECIAL TYPES					
Tanks/Liquid	4,396	5,100	5,075	4,636	4,370
Dry Bulk	1,426	953	1,065	1,358	1,253
Pole and Logging	1,019	556	710	832	1,060
Platform	12,509	17,672	17,648	14,975	13,309
Low-Bed	7,881	8,548	10,508	8,254	14,627
Dump	6,936	7,518	9,295	8,181	8,095
All Others	6,280	5,698	10,191	6,525	4,510
Total Special Types	40,447	46,045	54,492	44,762	47,224
TOTAL COMPLETE TRAILERS	141,170	169,999	186,483	180,142	167,312
Detachable Trailers[1]	–	–	5,223	438	417
Detachable Chassis[3]	16,208[2]	21,042	37,729	23,014	15,046
Dollies/Converter Gear[4]	2,064	2,175	2,917	4,614	4,567
TOTAL	18,272	23,217	45,869	28,066	20,030
GRAND TOTAL	159,442	208,925	232,352	208,208	187,656

Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.
p—Preliminary data. r—Revised data. [1]—Mostly container units. [2]—Figure combined with detachable trailers beginning in 1989. [3]—Primarily for use with containers. [4]—Separate axle and 5th wheel assembly used for twin-trailer and triple-trailer combinations.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	Interna-tional	Mack	All[2] Other	Total
Chevrolet	1990	4,361	–	9,721	–	–	–	14,082
	1989	1,882	–	9,971	–	–	–	11,853
Ford	1990	4,194	6,116	48	58,773	–	27,157	96,288
	1989	4,831	7,382	83	63,891	–	31,030	107,217
Freightliner	1990	7,059	9,438	5,746	–	–	–	22,243
	1989	8,389	11,969	3,348	–	–	–	23,706
GMC	1990	11,372	344	5,265	–	–	3	16,984
	1989	4,436	3,588	10,292	–	–	–	18,316
International	1990	1,113	15,126	–	38,694	–	–	54,933
	1989	1,530	19,969	–	39,568	–	–	61,067
Jeep Corp.	1990	–	–	–	–	–	–	0
	1989	–	–	–	–	–	–	0
Kenworth	1990	5,752	5,117	2,684	–	–	–	13,553
	1989	6,228	9,020	1,165	–	–	–	16,413
Mack	1990	49	64	–	–	15,028	102	15,243
	1989	149	155	–	–	18,057	191	18,552
Mercedes-Benz	1990	–	–	–	–	–	1,610	1,610
	1989	–	–	–			2,143	2,143
Peterbilt	1990	7,589	3,359	1,853	–	–	–	12,801
	1989	12,141	5,768	921	–	–	–	18,830
Volvo GM	1990	2,902	8,707	3,585	–	–	572	15,766
	1989	4,258	11,243	3,120	–	–	504	19,125
Others[1]	1990	216	301	129	–	–	–	646
	1989	316	345	128	–	–	–	789
Total	1990	44,607	48,572	29,031	97,467	15,028	29,444	264,149
	1989	44,160	69,439	29,028	103,459	18,057	33,868	298,011

Left: U.S. factory sales of diesel engines dropped 11.36% (33,862 units) in 1990. That follows a 9.5% decline in 1989. Market leader, International, continued to dominate sales at 97,467 units, more than twice that of either of its two biggest competitors—Cummins and Caterpillar. In fact, International sold more engines than Caterpillar and Cummins combined. International's share increased to 36.9% from 34.7% in 1989. Cummins sales fell 30.05% (20,867 units) in 1990, and its market share dropped to 18.4% from 23.3% a year earlier. Caterpillar and Detroit Diesel were the only engine makers showing sales gains last year, modest though they were. Caterpillar's inched up 1.1%, for 16.9% of the market. Detroit's sales increased by three units, up 0.01%, for an 11% share of market.
Source: Motor Vehicle Manufacturers Association. [1]—Others include: Oshkosh and Marmon. [2]—All Other includes: Isuzu, Mercedes-Benz, Scania-Vabis, Volvo and Ford. Reporting firms do not represent entire industry.

Good News, Bad News

Continued from page 76

kets the Class 7 Midranger model under each name plate.

The other two big producers in Class 8 are Volvo GM and Mack. Volvo GM, at 12.2% share, nudged out Kenworth (12%) for the third spot. Mack was close behind at 11.8%. Peterbilt finished the year in sixth place with a 9.8% share of the Class 8 retail business.

Meanwhile, the U.S. Dept. of Commerce predicts there soon will be a Japanese Class 8 truck in the American market.

Freightliner and Mistubishi Fuso finished 1990 at the top of the American Truck Dealers annual member survey of the most valuable truck dealer franchises. For the second consecutive year, dealers rated Freightliner first, Mistubishi second out of 17 truck franchises. Ford medium-duty was rated third most valuable; Ford heavy trucks were 12th. Ratings of Paccar companies Peterbilt and Kenworth were tied at 4th place.

American Truck Dealer members' average pre-tax profits dropped to 1.8% in 1990 from 2.0% in 1989. New truck revenues were off 11%, offset by 12% increases in service and parts sales, and 25% increases in sales for warranty work. □

Trailer outlook

Trailer makers were looking for a poor year in 1990. That's what they got. Shipments of new trailers totaled 141,170 units. Results for 1991 are expected to be worse.

Ken Kremar, director-capital goods and freight transportation, Economic Consulting and Planning Inc. of New York (ECAP) says his company forecasts trailer shipments for a number of trailer and component producers, as well as providing an annual outlook at the Truck Trailer Manufacturers Association convention. Kremar pegs 1991 trailer shipments from the factory at 129,000 units, but with more downside possible. That number won't hold, Kremar says, without a healthy pickup in buying activity during the second half of this year.

"The slump in motor carrier traffic and anemic earnings suggest little incentive to invest in new equipment unless it is absoutely necessary," Kremar says. "Conditions should be improving later this year, and a sharp increase in trailer buying is expected in 1992, with manufacturers shipments jumping to 165,000 units." That an average sales year in the trailer market.

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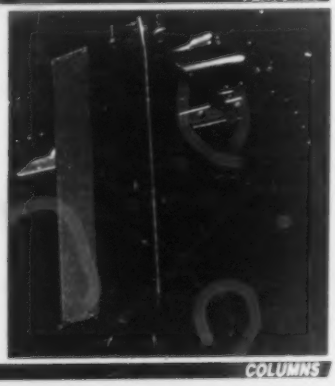

50 USING R-22 REFRIGERANT CAN BE... RISKY BUSINESS

Fleets experimenting with R-22 refrigeration are seeking a low-cost transition from yesterday's CFC-based refrigerant gases toward the ozone-friendly compounds of tomorrow. They have discovered that the trick to making this "transition gas" work is precise knowledge of one's temperature performance requirements and respect for the limits of R-22.

56 BLIND LUCK EQUALS BAD LUCK: THE NEED FOR CUSTOM MIRRORS

Sideswiped any cars lately? Here's a look at special mirrors that will reduce blind spots...and help keep your lawyers out of court.

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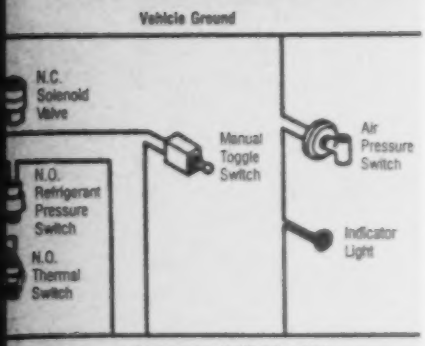

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"DOING" COMMUNICATION: THE GREAT MISCONCEPTION – The great misconception is that communicating is easy if you will just do it. Communicating is not easy, nor is it something you "do."

35 BUSINESS SIDE

TOUGH HIRING PROCEDURES WORK – Despite low wages, extensive testing and thorough records checks, Smith Terminal Distribution has no problems putting good drivers behind the wheel.

45 SAFETY

FHWA INTERPRETS CDL REQUIREMENTS – The Federal Highway Administration has published a 47-page booklet to clarify its Commercial Drivers License (CDL) program.

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WHEN OFF IS ON, AND OPEN IS CLOSED – Tom Kleich outlines procedures for installing bypass switches to override electrical control systems on Horton on/off fan clutches.

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IN THE NEXT ISSUE

The October edition will include the Annual Buyers' Guide, providing data on thousands of products and services segmented into more than 500 categories.

The Makes and Models section will offer specs, ratios and weights for 1992's light, medium and heavy-duty trucks. A special Hotline card makes it easy to get more information on each model.

Information on transmissions, axles, engines and 5th wheels will be noted in the Components section. And there also will be a directory of technical literature. □

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BUSINESS MAGAZINES/ MARKETING SERVICE/ BOOKS

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Reefer survey predicts growth

By **JIM CHARLESWORTH,** *Western Editor*

Keystone, Colo. – Representatives of truck marketing, maintenance and operations, plus equipment manufacturers, are optimistic about the future of temperature-controlled transportation. They predicted steady growth for reefer carriers at the annual meeting of the Interstate Truckload Carriers Conference, Refrigerated Div., held here in July.

Jim Chadbourne, senior vice president of sales and marketing, Marten Transport Ltd., Mondovi, Wisc., said: "Frozen shipments...are growing faster than any other segment of the temperature-controlled freight business. By the year 2000, $4.5 billion will be generated in these shipments."

Highlights of a Refrigerated Div. survey are noted in the chart below. Revenue categories of the responding reefer companies and the number of carriers in the groups are: Group I, $1-$10 million, 13 carriers; Group II, $11-$35 million, 9; Group III, $36-$51 million, 2; Group IV, $52-$100 million, 6. □

Carrier group	Group I	Group II	Group III	Group IV
Number of tractors	543	1,271	874	3,409
Number of reefers	672	1,642	1,196	4,117
Average number of tractors per fleet	41.8	141.2	437.0	568.2
Average number of reefers per fleet	51.2	182.4	598.0	686.2
Average revenue (million)/% growth	$6.2/ 30.0%	$22.4/ 3.8%	$43.3/ 15.0%	$63.3/ 18.2%
Average % dry freight	21.2%	32.5%	10.4%	23.8%
Average annual (million) miles	4.3	20.7	39.6	80.6
Average length of haul (miles)	787	908	790	1,453
Average number of loads/month	787	1,351	3,936	4,361
Average revenue/load	$851	$919	$1,002	$1,306
Average % empty miles	13.6%	9.7%	11.5%	9.2%

Fuel standards set for 1993-94 pickups, vans

The National Highway Traffic Safety Administration (NHTSA) has set Corporate Average Fuel Economy (CAFE) standards for 1993 light trucks at 20.4 mpg. The standard for 1994 models will increase to 20.5 mpg.

The standards apply to pickups and vans with gross vehicle ratings under 8,500 lb.

Standards for the 1990 and 1991-92 models, respectively, are 20.0 and 20.2 mpg. □

NHTSA safety award

The National Highway Traffic Safety Administration (NHTSA) plans to give an award to companies that have noteworthy safety programs for employees, and have promoted safety through a variey of measures to their customers and the public.

Procedures and selection criteria for the program are slated to be resolved this Fall. Nominations will be solicited in the Winter of 1991.

The first award winners will be announced in 1992. □

MVMA surveys image of trucking

Americans "clearly recognize and appreciate the economic importance of trucks in their daily lives and the significant improvements truck makers have incorporated in manufacturing today's trucks," claims Thomas H. Hanna, president of the Motor Vehicles Manufacturing Association.

Hanna based that conclusion on results of an MVMA study conducted by the ICR Research Group, Media, Pa. ICR surveyed 1,000 adults about truck operators and manufacturers and the role trucks play in the U.S.

The survey discovered that:

1. The public image of trucks may be as much affected by their image of truck drivers as it is by the vehicles.
2. Although the public recognizes the difficult job truck drivers have, they also feel truck drivers should drive more safely and be more considerate of car drivers.
3. Until the issue of driver safety is neutralized, big trucks won't be acceptable to the public.

A section of the survey had a series of statements, which respondents were asked to agree or disagree with. Their responses determined that:

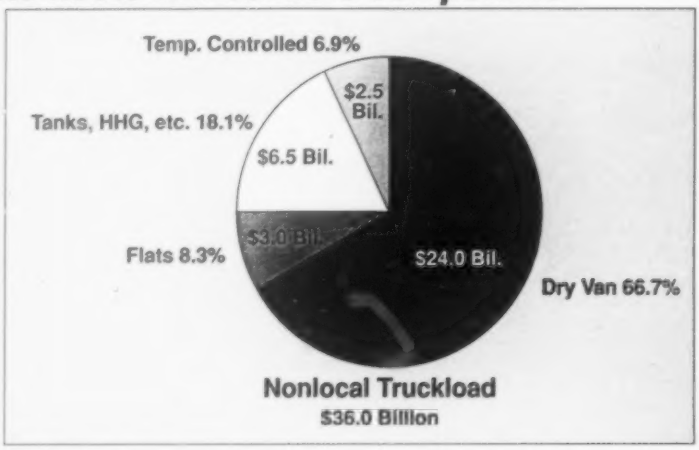
- 81% think new trucks are more pollution-free than older trucks.
- 79% believe truck makers have done a good job of making trucks conspicuous at night.
- 60% agree that today's trucks are equipped with state-of-the-art safety features.
- 41% think truck builders have reduced the problems of splash and spray on rainy days.
- 58% agree that truck drivers use the size of their truck to intimidate other drivers.
- 91% believe car drivers need to be more understanding and aware of the special characteristics for driving large trucks. □

Analyst predicts private fleets will be more competitive

Shifting traffic from private fleets to common carriers "was easy" in the 1980s. But in the 1990s, private carriage will be a "much tougher" competitor.

Those observations were made by John G. Larkin in a presentation last month in Williamsburg, Va., at the Private Fleet Management Institute sponsored by the National Private Truck Council.

Larkin is an analyst who focuses on the truckload market for Alex. Brown & Sons, the Baltimore investment bank.



This is a breakdown, by equipment type, of the revenues captured by the over-the-road truckload industry in 1990.

How traffic was captured

Freight once handled by private carriage was an easy target for common carriers because, said Larkin, many private fleets had "weak" lane balance, poor equipment utilization, high equipment costs, unsophisticated systems development, and they were unionized.

But private fleets are more competitive now, claims Larkin.

That's because:

- "the easy freight" has already been captured by for-hires;
- for-hire carriers' marketing/logistics staffs are "not sophisticated;"
- much of the freight that could be converted to common carriage requires the ability to provide "specialized/tailored services;"
- contract logistics firms may eventually manage the distribution process.

Larkin also noted that consolidation in the for-hire sector is "accelerating" because weak carriers are having their loans called by lenders, they are being pressured by their insurance carriers, they are most vulnerable to the economic slowdown, and they are less attractive to drivers and shippers.

There's over-capacity in the long-haul TL sector, Larkin observed. But growth opportunities continue for common carriers in the short-haul/specialized market for reasons such as "less rate bashing" in service-sensitive niches and "retreating railroads in the East."

Common carriers should grow by diversification and acquisition, continued Larkin.

That can be accomplished, he explained, by: buying niche operations such as flatbed fleets or temperature controlled carriers; initiating contract carriage and dedicated fleet operations; moving into shorter-haul niches; participating in intermodal partnerships, creating alliances with third parties so you're not left out of the growing international markets; and diversifying into distribution/logistics services. □

John Larkin provided the following data on the large, highly segmented trucking industry as part of his presentation to members of the National Private Truck Council's Management Institute:

- **With a 77.7% market share, based on $239.2 billion on annual revenues, trucks dominate the $307.8 billion domestic commercial transportation market.**
- **The $140 billion, nonlocal trucking market includes the following sectors: private fleets, $77 billion, 55%; for-hire truckload (TL), $36 billion, 25.7%; less-than-truckload (LTL), $17 billion, 12.2%.**
- **Market share and revenues captured by equipment-type segments of the $36 billion TL industry are: dry vans, $240 billion, 66.7%; bulk fleets and household goods carriers, $6.5 billion, 18.1%; flatbeds, $3 billion, 8.3%; temperature controlled, $2.5 billion, 6.9%.**
- **A breakdown of the percentage of revenues garnered by the TL industry, based on fleets' average length of haul, is: 45.2%, under 100 miles; 26.7%, 100-499 miles; 10.1%, 500-999 miles; 7.8%, 1,000-1,499 miles; 5.4%, 1,500-1,999 miles; 3.8%, 2,000-2,499 miles; 1.0%, 2,500-2,999 miles.**

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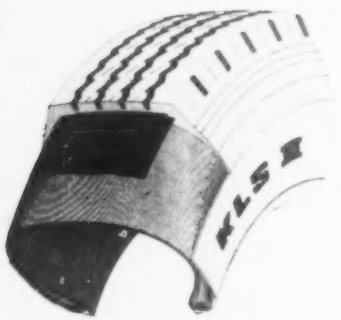

Maintenance & Technology

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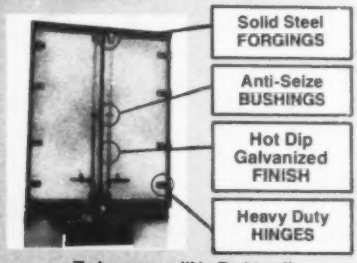

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IN THE NEXT ISSUE

CCJ will help relieve fleet operators' "compliance anxiety" about coping with projected diesel engine emission regulations when they read the two-part, exclusive feature on that topic in November. One article will focus on lessons learned from using diesels designed to meet 1991 Environmental Protection Agency regulations. The other story will reveal the emission-control devices – NOT particulate traps as many expected – that will be used in 1994 and beyond. □

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ATA promotes insurance programs

A range of employee benefits designed for trucking companies is being offered by Seabury & Smith, a nationwide insurance program management firm, based in Washington, D.C.

Seabury & Smith is a subsidiary of Marsh & McLennan Companies, a worldwide insurance, consulting and investment management firm.

Although Seabury & Smith's Security Assurance Program has been established through a contract with the American Trucking Associations, the life, health and accident coverage is not limited to ATA members.

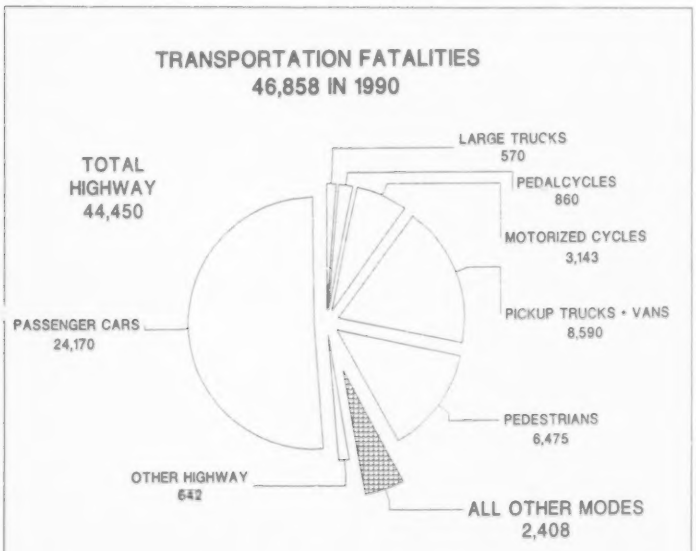
The Flexible Security Plan portion of the program offers "cafeteria-style," health benefits to carrier employees who choose a level of coverage under provisions of the IRS Section 125 plan. Thus, employees pay premiums, out-of-pocket medical expenses and dependent day care expenses on a pre-tax basis.

Three term life insurance options are available under the ATA Group Insurance Trust with a maximum of $250,000. The accidental, death and dismemberment insurance plan, which has a $750,000 maximum, is available independently or with the term life insurance coverage.

The ATA Group Insurance Trust is available to all active, full-time employees and their dependents not covered by a collective bargaining agreement. Employers can offer coverage at 300%, 200% or 100% an employee's annual earnings.

According to an association official, ATA receives a "small percentage" of the premiums.

For more information, call 800-ATA-4495. □



This chart shows estimated fatalities by transportation mode, based on U.S. Department of Transportation data. According to the National Transportation Safety Board, transportation-related fatalities, which decreased for the second consecutive year, declined 3% in 1990. While fatalities involving large trucks decreased from 722 in 1989 to 570 last year, railroads were the only mode that had increased deaths from accidents. □

Do you have 'real' pollution protection?

Fleets that haul hazardous materials and wastes may not be able to get the pollution insurance coverage they once had under their liability policy.

In fact, according to David Rosenberg, most commercial automobile policies which cover trucking operations contain an "absolute pollution exclusion" clause, barring coverage for any environmental incident.

Rosenberg is executive vice president, Environmental Compliance Services (ECS) Inc., Exton, Pa. ECS specializes in environmental insurance underwriting and consulting, and risk management. The firm, a general agency for Reliance National Insurance Co., has grown from a 16-employee, $6 million underwriter in 1984 to more than 100 employees. It handles more than $100 million in premiums.

The 1980 Motor Carrier Act requires a fleet's liability insurance policy to include a MCS-90 endorsement form.

The endorsement form expands upon the definitions and terms noted in the standard insurance policy, describing in detail elements such as coverage limits provided as well as a statement that the policy provides restitution for environmental losses.

But insurance companies "typically use the endorsement only to comply with the law," Rosenberg says. Then the insurer seeks reimbursement directly from the fleet for the money it spent to satisfy the MCS-90 obligation.

That's why he says truckers should make sure their insurer provides the protection outlined in their MCS-90 endorsement.

To be eligible for ECS' pollution liability coverage, Rosenberg added, fleets must meet "strict minimum criteria" such as contingency plans for when a spill occurs. □